

# LZ 2000

20<sup>th</sup> Anniversary Edition

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

2023

LeadingAge®



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LZ 200

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

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# Raising the Bar



*LeadingAge members take responsibility for raising the bar in our field, as not-for-profit senior living providers. Ours is a public promise to expand the world of possibilities for aging to the best of our ability – and an internal pledge to always strive to fulfill that commitment through innovation and excellence. LeadingAge offers programs and resources, including this report, based on the latest senior living field-related research and knowledge.*

## A Note from LeadingAge

LeadingAge is pleased to partner with Ziegler to bring you the 20th edition of the LeadingAge Ziegler 200 ("LZ 200").

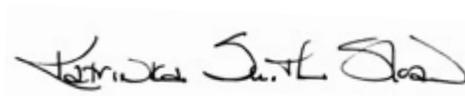
LeadingAge is pleased to partner with Ziegler to bring you the 20th edition of the LeadingAge Ziegler 200 ("LZ 200").

For 20 years, this publication has been an eagerly anticipated annual report of the largest, most complex nonprofit senior living organizations. It demonstrates the significant role that LeadingAge member organizations continue to play in the aging services sector. Each is rooted in their community, delivering on their mission to serve older adults and living their promise to deliver exceptional care and support.

LeadingAge members are innovators, bringing creativity to complex challenges. Their executive leaders and boards plan strategies to reposition, grow, change, partner, and venture into new lines of service and sustainability. The following pages present a snapshot of the ongoing story of our members' transformational leadership and good works.

The LeadingAge Ziegler 200 is not designed to be a qualitative report, nor an endorsement of any specific organization. Each organization ranking represents strong governance and powerful leadership dedicated to quality services and long-term success. Their stories and experiences can strengthen the entire field – and help increase public understanding of the critical services and supports our sector provides.

LeadingAge is committed to serving as the trusted voice for aging. Thank you for your interest and ongoing support of this report.

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

Katie Smith Sloan  
President and CEO  
LeadingAge





# Ziegler

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*LeadingAge has been the ideal partner for this research initiative and we look forward to seeing providers, industry professionals and key stakeholders take full advantage of the wealth of information this publication provides.*



## A Note from Ziegler

We are excited to release the 20th edition of the LeadingAge Ziegler publication, compiling data from the largest 200 not-for-profit senior living providers in the country. LeadingAge has been the ideal partner for this research initiative and we look forward to seeing providers, industry professionals and key stakeholders take full advantage of the wealth of information this publication provides. This year's report highlighting the 200 largest not-for-profit providers, represents more than 300,000 market-rate units and nearly 1,600 market-rate communities across the country. The report also highlights the largest single-site providers, the largest providers of Affordable Housing for seniors and the providers who are providing sizeable management services to other senior living & care communities.

Each year, we strive to stay on top of the latest trends impacting not-for-profit senior living & care providers. This year's publication continues to include the core sections with the number of units and communities, but also reveals insight into additional trends in home and-community-based services, third-party management, rental Life Plan Communities (LPCs), technology adoption, joint ventures and future growth plans, to name a few. As has been observed across the

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

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

Enjoy the 2023 LeadingAge Ziegler 200 publication!

A handwritten signature in black ink that reads 'Daniel J. Hermann'.

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





# The LeadingAge Ziegler 200



## *History*

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

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

The 2023 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, 2022**.

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

<sup>1</sup>2022 ranking data and amounts provided by Refinitiv as of 12/31/22.

# Chapter 1

## ***Understanding the LeadingAge Ziegler 200***

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

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

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

capabilities and honing their skills – striving to provide quality service for generations to come.

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

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

By assembling and presenting the combined data and knowledge of LeadingAge and Ziegler, the LZ 200 publication answers many of these questions. From its inception, the creation of the LZ 200 was an innovative move for those involved with not-for-profit senior living. To our knowledge,



listing the largest not-for-profit senior living systems by the number of units they own and operate, representing the number of residents they serve, rather than by their financial success, created a new way of ordering systems, providing a fresh perspective on what was previously understood as a known market. The journey in creating and updating the LZ 200 annually has provided a wealth of data by which to understand and analyze the characteristics of senior living system providers' growth and change.

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





# Chapter 2



## *The Largest 200*

### *A Quantitative Listing*

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

## *Methodology*

### *Defining a Multi-site Organization*

For the purposes of the LZ 200 listing and analyses, a multi-site organization, or system, has been defined as a **LeadingAge-member**

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

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

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

the primary LZ 200 listing. Rankings for affordable housing providers are included in Chapter 6 of the report. In previous years, systems that were comprised primarily of acute or post-acute services or health care systems were also excluded. Beginning with the 2016 report, additional systems were included to reflect not-for-profit health systems that have a separate division, or ministry, with a distinct focus on operating as a senior living system. Two examples of such a system are Ascension 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, as mentioned earlier, ranked in a list of their own later in this publication).

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

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

Data used for ranking the 2023 LZ 200 were provided and confirmed (“confirmation”) by 161 of the 200 organizations. Nine confirmations were received from the “Over 200,” the organizations ranked from 201 to 223.

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

# Key Findings

- ***An understanding of size ...*** The systems range from 21,959 units to 394 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 2.2%, with independent living and assisted living growth each year, but decline in the number of nursing care beds. Memory care units are becoming an increasingly important component of the annual unit counts, with 69% of the LZ 200 offering specialized memory care units.
- ***Insights into type of growth ...*** The LZ 200 have grown primarily through expansion, with the number of units via new campus growth having slowed in the past several years. Most of the growth in recent years has been from within existing campuses in the form of unit expansions. At the same time, organizations continue to dispose of dated nursing homes or financially stressed communities. Recent years have also seen an uptick in the number of organizations growing through affiliation, acquisition or merger.
- ***Home and community-based services ...*** Growth is also taking place in the form of home-based services, such as home health, home care, adult-day care, continuing care at home (CCaH) programs or PACE (Program for All-Inclusive Care for the Elderly). Of the LZ 200, 45% offer some type of home and community-based services to non-residents. This year, the CCaH model, which had gained popularity in the past, is now offered by more than 10% of the LZ 200 (3% more 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. Minnesota has the largest total number of communities, with 212.



- **Technology ...** On average, 72% of the LZ 200 communities have adopted electronic point of care/point of service documentation systems and electronic health/medical records. Adoption is generally lower for health and wellness technologies, such as medication monitoring or telehealth remote monitoring; and care/case management and coordination reveals that 57% use this software. A category added in 2020, social connectedness/resident engagement, reveals that 60% use this technology; and 42% system providers utilize more advanced analytical tools. Due to the pandemic, two new categories were added in 2021, 55% implemented staff and resident screening, and 55% added infection control technologies. In 2022, we added two new categories regarding robotic technology, 30% have implemented robotic process automation while 70% have added physical robotics.
- **Joint ventures and partnerships ...** Nearly 36% of LZ 200 organizations are engaged in a formal joint venture, most commonly with another provider, a health system or a home health/home care agency. This is slightly more than the 35% reported in the 2022 report.

# 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 2023 and 2022 rank shown. Charts 3-1b-d rank the organizations by market-rate independent living units, by assisted living units and, finally, by nursing care beds. When the 2023 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations..

**The 2023 Rank** column displays the numerical ranking of each system according to its 12/31/22 data within the LZ 200 for each of the four listings: 1) Total Senior Living Units, i.e., the **Primary Ranking** (Chart 3-1a); 2) Total Independent Living Units (Chart 3-1b); 3) Total Assisted Living Units (Chart 3-1c); and 4) Total Nursing Care Beds (Chart 3-1d).

An organization’s ranking in each respective listing may change depending on the composition of its unit mix, that is, the mix of independent living units to assisted living units to nursing units within its system of communities.

**The 2022 Rank** shows the numerical ranking of the listed organization in last year’s publication (according to its 12/31/21 data) listing of the same type. The organizations that show “NR” (Not Ranked) were not included in the LZ 200 rankings for 2021. Also note that with the increase to the largest 200 in the 2021 publication, the “Over 200” connotes a different meaning than in previous years when the rankings ended at 100. The “Over 200” in the current publication represent organizations ranked 201 through 223 as of 12/31/2022.

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

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

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

**Units (as of 12/31/22).** The systems listed in the 2023 LZ 200 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/22. Managed communities that are not owned are discussed later in the publication (Chapter 4) and are not included in the total community count compiled in the LZ 200 Primary Ranking. Government-subsidized (affordable housing) units are also excluded from this count but are presented for each of the LZ 200 organizations in subsequent listings (*Chapter 4*).

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

**Independent living units (ILU)** units may be composed of apartments, duplexes, triplexes, quadplexes, or single-family homes. Typically, residents in independent living units pay a combination of a monthly fee and one-time entrance fee. (Note: some residents own these units, but this type of

equity model represents a very small number of the independent living units within the LZ 200.) Those who pay a monthly fee will usually receive services such as housekeeping, maintenance, dining, security, and lawn maintenance.

**Assisted living units (ALU)** bridges the gap between independent living and nursing home care. Trained employees provide supportive care to residents who are unable to live independently and require assistance with activities of daily living (ADLs), including management of medications, bathing, dressing, toileting, ambulating, and eating. Personal Care or Residential Care Units (PCU/RCU) are included in the overall ALU total for LZ 200 organizations. These units share similarities with ALUs but are not licensed as such.

**Nursing care beds (NCB)** provide care for those who need rehabilitative care or can no longer live independently because of a chronic physical or mental condition that requires round-the-clock

nursing care. Meals, laundry, housekeeping, and medical services are provided. In most cases, these units are licensed for Medicaid and/or Medicare reimbursement.

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

**Communities (as of 12/31/22).** Over the years, various terms have been used to describe a senior living property: site, location, facility, campus, and community. A high rise on a limited acreage parcel does not fit the term "campus." A scattering of buildings, offering various levels of care, across extended acreage does not fit the

term “facility.” We believe the best all-encompassing word to use is “community.” The communities examined are life plan communities (LPC), independent living communities (IL), assisted living communities (AL), and nursing homes (NH). It is important to note that a single Life Plan Community may include ILU (independent living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will contain at least independent living and nursing care . The Life Plan Community’s resident payment plans may include entrance fee, condo/co-op, and/or rental programs. Generally, the majority of the Life Plan Community’s units are not NCB. For communities listed as IL, AL or NH, these are communities whose primary unit mix is reflected by the name (e.g. IL community being predominantly Independent Living units.) In a

number of cases, these communities may also offer an additional level of care (e.g. Independent Living along with Assisted Living being listed as an “IL” community). In these instances, the predominant level of care determines the community label. The systems listed in the LZ 200 are ranked by totaling the communities owned by the system in these four key areas: LPCs, IL, AL, and NH.

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

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

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

## Ranked by Total Senior Living Units

2023 Rank	2022 Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Communities	VA	21,959	19,140	1,807	1,012	16	16	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	15,820	5,155	2,242	8,423	124	52	7	19	46
3	4	Presbyterian Homes & Services	MN	9,646	5,307	2,867	1,472	54	16	37	0	1
4	3	Acts Retirement-Life Communities	PA	9,432	6,763	1,146	1,523	26	26	0	0	0
5	5	Ascension Living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
6	8	Lifespace Communities, Inc.	IA	5,958	4,046	785	1,127	17	17	0	0	0
7	6	HumanGood	CA	5,817	3,580	1,141	1,096	22	21	1	0	0
8	7	Covenant Living Communities & Services	IL	5,649	3,653	973	1,023	19	15	2	1	1
9	9	Trinity Health Senior Communities	MI	5,136	1,942	1,165	2,029	33	6	10	2	15
10	10	Benedictine	MN	4,625	879	1,653	2,093	34	10	3	4	17
11	11	Westminster Retirement Communities of Florida	FL	4,239	2,905	553	781	10	10	0	0	0
12	13	Front Porch Communities and Services	CA	4,223	3,023	477	723	19	10	9	0	0
13	16	Cassia	MN	3,668	138	2,144	1,386	47	0	2	28	17
14	15	Asbury Communities, Inc.	MD	3,565	2,215	560	790	9	9	0	0	0
15	14	Lutheran Senior Services	MO	3,446	1,741	731	974	9	8	0	1	0
16	17	The Kendal Corporation	DE	3,380	2,329	616	435	10	8	1	0	1
17	18	Pacific Retirement Services	OR	3,253	2,536	373	344	10	10	0	0	0
18	20	Otterbein SeniorLife	OH	3,234	1,471	598	1,165	18	9	0	0	9
19	19	Presbyterian Senior Living	PA	3,124	1,655	594	875	15	11	3	1	0
20	21	Concordia Lutheran Ministries	PA	2,965	1,038	1,264	663	15	6	0	7	2
21	23	The Carmelite System, Inc.	NY	2,898	51	498	2,349	15	1	0	3	11
22	40	BHI Senior Living, Inc.	IN	2,808	1,248	1,011	549	9	9	0	0	0
23	22	Ohio Living	OH	2,716	1,605	455	656	12	9	1	0	2
24	26	Springpoint Senior Living	NJ	2,595	1,726	378	491	10	8	0	1	1
25	12	Retirement Housing Foundation	CA	2,576	1,707	594	275	10	5	5	0	0

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

### Ranked by Total Senior Living Units

2023 Rank	2022 Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	24	Masonic Villages of the Grand Lodge of PA	PA	2,553	1,631	256	666	5	3	1	0	1
27	25	Transforming Age	WA	2,543	1,759	706	78	18	3	11	4	0
28	27	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
29	32	Willow Valley Communities	PA	2,212	1,638	232	342	3	3	0	0	0
30	39	Bethesda Senior Living Communities	CO	2,171	513	1,658	0	21	0	5	16	0
31	29	Christian Care Companies	AZ	2,164	1,687	409	68	6	0	5	0	1
32	30	Presbyterian Manors of Mid-America	KS	2,099	851	538	710	15	14	0	1	0
33	31	Ecumen	MN	2,090	431	1,370	289	31	0	7	20	4
34	33	National Church Residences	OH	2,078	1,215	716	147	13	3	1	9	0
35	34	WesleyLife	IA	2,007	869	441	697	11	10	0	0	1
36	35	Homewood Retirement Centers. Inc.	MD	1,905	1,163	291	451	5	4	1	0	0
37	36	Greencroft Communities	IN	1,867	676	581	610	9	7	0	2	0
38	41	Franciscan Communities, Inc.	IL	1,804	744	479	581	8	4	1	3	0
39	37	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
40	57	Lutheran Services Carolinas	NC	1,757	519	334	904	10	3	1	0	6
41	45	Bethesda Health Group, Inc.	MO	1,701	761	78	862	13	0	7	2	4
42	42	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
43	43	Buckner Retirement Services	TX	1,688	1,018	344	326	6	6	0	0	0
44	83	Life Enriching Communities	OH	1,686	907	408	371	6	6	0	0	0
45	44	Loretto	NY	1,684	210	551	923	9	1	2	4	2
46	28	Christian Horizons	MO	1,646	355	312	979	12	8	2	2	0
47	38	United Church Homes, Inc.	OH	1,640	837	159	644	13	4	5	0	4
48	46	Presbyterian SeniorCare Network	PA	1,589	508	405	676	7	7	0	0	0
49	47	Immanuel	NE	1,587	909	447	231	19	8	2	7	2
50	48	Eskaton	CA	1,580	442	652	486	12	1	1	7	3

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

### Ranked by Total Senior Living Units

2023 Rank	2022 Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	59	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	1	0
52	49	Hebrew SeniorLife	MA	1,542	654	115	773	4	2	1	0	1
53	52	Mississippi Methodist Senior Services, Inc.	MS	1,450	776	354	320	12	2	8	0	2
54	53	Lifespire of Virginia	VA	1,441	887	327	227	5	5	0	0	0
55	50	Baptist Village Communities	OK	1,415	933	257	225	11	2	8	1	0
56	55	Lutheran Life Communities	IL	1,402	408	310	684	4	3	0	0	1
57	54	Presbyterian Homes	IL	1,399	821	237	341	4	3	1	0	0
58	61	Presbyterian Villages of Michigan	MI	1,366	1,000	264	102	10	1	7	2	0
59	58	Masonicare	CT	1,326	651	309	366	7	2	2	2	1
60	51	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
61	60	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
62	62	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
63	63	National Lutheran Communities and Services	MD	1,255	697	247	311	4	3	0	1	0
64	66	Diakon	PA	1,236	625	197	414	4	4	0	0	0
65	64	Wesley Enhanced Living	PA	1,221	634	227	360	6	5	0	1	0
66	65	American Baptist Homes of the Midwest	MN	1,220	359	272	589	7	5	0	0	2
67	68	Holland Home	MI	1,219	757	303	159	2	2	0	0	0
68	70	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
69	72	Phoebe Ministries	PA	1,179	370	275	534	4	4	0	0	0
70	73	Wesley	WA	1,163	765	214	184	4	0	4	0	0
71	71	Friendship Village	MO	1,157	785	138	234	2	2	0	0	0
72	69	Brio Living Services fka UMRC and Porter Hills	MI	1,156	675	337	144	6	2	2	1	1
73	79	Baruch Senior Ministries	MI	1,156	6	1,150	0	29	0	0	29	0
74	81	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
75	74	United Methodist Homes	NY	1,129	436	267	426	4	3	0	1	0

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

### Ranked by Total Senior Living Units

2023 Rank	2022 Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	56	Providence Life Services	IL	1,120	738	245	137	6	1	4	1	0
77	76	Sequoia Living, Inc.	CA	1,116	844	136	136	4	4	0	0	0
78	77	Ingleside	MD	1,112	832	157	123	3	3	0	0	0
79	80	Eventide	MN	1,077	65	460	552	6	5	0	1	0
80	78	Friendship Senior Options	IL	1,075	679	184	212	2	2	0	0	0
81	87	Walker Methodist	MN	1,069	328	481	260	8	1	4	2	1
82	90	Lutheran SeniorLife	PA	1,053	519	231	303	11	2	8	0	1
83	84	Brightspire fka The Presbyterian Homes	NC	1,023	701	133	189	3	3	0	0	0
84	85	Lutheran Homes of South Carolina Inc.	SC	1,009	417	249	343	5	5	0	0	0
85	107	Goodwin Living fka Goodwin House Incorporated	VA	996	704	119	173	3	3	0	0	0
86	88	Presbyterian Communities of South Carolina	SC	996	423	306	267	6	6	0	0	0
87	93	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
88	92	UMRH, Inc.	NC	976	640	140	196	3	3	0	0	0
89	89	Felician Services, Inc.	IL	974	172	257	545	8	2	2	1	3
90	75	Pinnacle Living	VA	973	544	263	166	4	4	0	0	0
91	100	Haverland Carter Lifestyle Group	NM	971	451	390	130	4	2	0	2	0
92	95	The RiverWoods Group	NH	967	681	242	44	3	3	0	0	0
93	96	EveryAge	NC	959	541	90	328	3	3	0	0	0
94	103	St. Andrew's Resources for Seniors System	MO	938	474	183	281	6	2	2	1	1
95	91	Blue Skies of Texas	TX	937	728	129	80	2	2	0	0	0
96	119	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
97	97	Christian Living Communities	CO	919	421	306	192	6	3	0	3	0
98	98	St. John's Home	NY	916	403	38	475	4	0	1	1	2
99	99	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	3	2	1	0	0
100	104	Givens Communities	NC	904	751	43	110	2	2	0	0	0

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

### Ranked by Total Senior Living Units

2023 Rank	2022 Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	113	Lutheran Social Ministries of MD	MD	893	700	60	133	2	2	0	0	0
102	105	Menno Haven, Inc.	PA	891	508	223	160	2	2	0	0	0
103	101	Masonic Homes of Ky, Inc.	KY	887	449	181	257	3	2	1	0	0
104	94	Saint Therese	MN	886	438	160	288	5	3	1	1	0
105	102	United Methodist Communities	NJ	882	88	546	248	4	1	0	3	0
106	117	Landis Communities	PA	868	610	155	103	4	1	2	1	0
107	106	Sun Health Services	AZ	866	637	114	115	3	3	0	0	0
108	112	Alliance Health & Human Services	MA	861	0	0	861	7	0	0	0	7
109	108	Mather	IL	848	712	59	77	3	2	1	0	0
110	109	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
111	114	The Moorings, Incorporated	FL	838	625	107	106	3	1	2	0	0
112	110	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
113	86	Christian Care Communities	KY	835	262	154	419	10	5	3	2	0
114	111	Living Branches	PA	834	459	232	143	3	2	0	1	0
115	116	LutherCare	PA	823	484	128	211	3	2	0	0	1
116	115	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	3	3	0	0	0
117	125	Illuminus fka Marquardt Village, Inc.	WI	810	287	283	240	5	2	1	1	1
118	121	Wesley Willows	IL	801	547	163	91	2	1	1	0	0
119	118	Westminster-Canterbury on Chesapeake Bay	VA	799	611	80	108	2	1	1	0	0
120	122	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
121	123	Sunnyside Communities	VA	773	484	155	134	3	3	0	0	0
122	126	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
123	127	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
124	128	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
125	129	Samaritas	MI	761	293	120	348	5	1	2	0	2

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

### Ranked by Total Senior Living Units

2023 Rank	2022 Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	158	Ebenezer Society	MN	753	0	443	310	8	0	0	6	2
127	82	Christian Health	NJ	746	353	95	298	7	1	4	1	1
128	133	Benevolent Corporation Cedar Community	WI	737	437	225	75	7	1	3	2	1
129	NR	Futura Age fka eliseo and Foss Home	WA	733	221	114	398	2	1	0	0	1
130	124	Vista Prairie Communities	MN	729	100	629	0	8	0	1	7	0
131	120	Simpson Senior Services	PA	726	454	170	102	3	3	0	0	0
132	134	Bethany Lutheran Homes Inc.	WI	726	282	321	123	10	2	1	6	1
133	135	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
134	136	Episcopal SeniorLife Communities	NY	709	334	193	182	9	0	5	3	1
135	137	Morningside Ministries	TX	708	434	134	140	3	2	1	0	0
136	139	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
137	131	Brazos Presbyterian Homes Inc.	TX	697	503	91	103	3	3	0	0	0
138	148	Sunset Senior Communities	MI	696	384	312	0	4	0	2	2	0
139	143	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
140	138	Ohio Masonic Home	OH	676	302	242	132	3	2	0	1	0
141	144	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
142	NR	Ascentria Care Alliance	MA	673	0	57	616	5	0	0	0	5
143	132	Messiah Lifeways	PA	660	362	163	135	2	1	1	0	0
144	NR	Well•Spring Group	NC	649	461	94	94	2	2	0	0	0
145	147	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
146	149	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
147	150	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
148	151	ThriveMore fka Baptist Retirement Homes of North Carolina, Inc.	NC	608	267	140	201	4	2	0	1	1
149	156	Friends Homes, Inc.	NC	603	394	100	109	2	2	0	0	0
150	152	Episcopal Communities & Services	CA	591	443	109	39	4	3	0	1	0

NR: Not Ranked in that year

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

### Ranked by Total Senior Living Units

2023 Rank	2022 Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	153	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
152	NR	Retirement Companies of America	TN	580	396	94	90	2	2	0	0	0
153	154	Lutheran Life Villages	IN	577	183	69	325	4	2	0	0	2
154	146	Baptist Senior Services	PA	573	426	84	63	2	1	1	0	0
155	157	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
156	159	Bethel	NY	563	170	130	263	5	1	1	1	2
157	160	The Legacy Senior Communities	TX	558	298	146	114	2	2	0	0	0
158	162	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
159	163	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
160	NR	FellowshipLIFE fka Fellowship Senior Living	NJ	550	331	152	67	2	2	0	0	0
161	161	St. John's United	MT	546	204	167	175	5	4	0	1	0
162	166	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
163	165	Bluestem Communities	KS	541	320	63	158	2	2	0	0	0
164	168	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
165	170	Medford Leas	NJ	537	394	119	24	2	1	1	0	0
166	171	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
167	172	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
168	173	CRISTA Senior Living	WA	524	374	150	0	2	0	1	1	0
169	175	Redstone Presbyterian SeniorCare	PA	524	304	143	77	3	1	2	0	0
170	174	Rockwood Retirement Communities	WA	521	341	135	45	2	2	0	0	0
171	167	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
172	192	Willow Brook Christian Communities	OH	520	267	169	84	3	2	0	0	1
173	176	LindenGrove Communities	WI	511	0	258	253	4	4	0	0	0
174	177	United Methodist Homes, Inc.	CT	507	90	297	120	3	1	0	2	0
175	180	Eliza Jennings Senior Care Network	OH	506	176	114	216	3	1	0	1	1

NR: Not Ranked in that year

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

### Ranked by Total Senior Living Units

2023 Rank	2022 Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	155	Episcopal Retirement Services	OH	500	277	85	138	3	3	0	0	0
177	178	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
178	179	Knute Nelson	MN	494	211	200	83	5	0	2	2	1
179	NR	St. Edward Home	OH	493	177	235	81	3	0	0	3	0
180	181	St. Paul's Senior Services	CA	482	134	289	59	4	0	1	2	1
181	182	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2
182	183	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
183	184	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
184	188	Good Shepherd Communities	NY	457	192	99	166	3	1	0	0	2
185	186	Beechwood Continuing Care, Inc.	NY	456	184	0	272	3	0	2	0	1
186	185	The Lutheran Home Inc.	WI	455	170	98	187	2	0	1	0	1
187	187	Loomis Communities Inc.	MA	454	357	55	42	3	3	0	0	0
188	190	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
189	183	Allegheny Lutheran Social Ministries	PA	431	183	96	152	3	3	0	0	0
190	164	Bethesda	MN	430	89	93	248	3	1	1	1	0
191	194	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
192	197	Community First Solutions	OH	426	197	101	128	3	2	0	0	1
193	189	Genacross Lutheran Services	OH	426	107	119	200	2	2	0	0	0
194	NR	Convivial Life Inc.	FL	424	243	181	0	2	1	0	1	0
195	195	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
196	196	Wesbury	PA	418	117	91	210	2	1	1	0	0
197	198	A.G. Rhodes	GA	413	0	0	413	3	0	0	0	3
198	199	Parker	NJ	407	0	60	347	6	0	0	1	5
199	200	South Carolina Baptist Ministry of Aging (SCBMA)	SC	398	139	83	176	2	2	0	0	0
200	>200	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	4	0	2	2	0

NR: Not Ranked in that year

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

## Ranked by Independent Living Units

2023 IL Rank	2022 IL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Communities	VA	21,959	19,140	1,807	1,012	16	16	0	0	0
2	2	Acts Retirement-Life Communities	PA	9,432	6,763	1,146	1,523	26	26	0	0	0
3	3	Presbyterian Homes & Services	MN	9,646	5,307	2,867	1,472	54	16	37	0	1
4	4	The Evangelical Lutheran Good Samaritan Society	SD	15,820	5,155	2,242	8,423	124	52	7	19	46
5	5	Lifespace Communities, Inc.	IA	5,958	4,046	785	1,127	17	17	0	0	0
6	7	Covenant Living Communities & Services	IL	5,649	3,653	973	1,023	19	15	2	1	1
7	6	HumanGood	CA	5,817	3,580	1,141	1,096	22	21	1	0	0
8	8	Front Porch Communities and Services	CA	4,223	3,023	477	723	19	10	9	0	0
9	9	Westminster Retirement Communities of Florida	FL	4,239	2,905	553	781	10	10	0	0	0
10	11	Pacific Retirement Services	OR	3,253	2,536	373	344	10	10	0	0	0
11	12	The Kendal Corporation	DE	3,380	2,329	616	435	10	8	1	0	1
12	13	Asbury Communities, Inc.	MD	3,565	2,215	560	790	9	9	0	0	0
13	14	Trinity Health Senior Communities	MI	5,136	1,942	1,165	2,029	33	6	10	2	15
14	17	Ascension Living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
15	18	Transforming Age	WA	2,543	1,759	706	78	18	3	11	4	0
16	16	Lutheran Senior Services	MO	3,446	1,741	731	974	9	8	0	1	0
17	19	Springpoint Senior Living	NJ	2,595	1,726	378	491	10	8	0	1	1
18	10	Retirement Housing Foundation	CA	2,576	1,707	594	275	10	5	5	0	0
19	20	Christian Care Companies	AZ	2,164	1,687	409	68	6	0	5	0	1
20	15	Presbyterian Senior Living	PA	3,124	1,655	594	875	15	11	3	1	0
21	23	Willow Valley Communities	PA	2,212	1,638	232	342	3	3	0	0	0
22	21	Masonic Villages of the Grand Lodge of PA	PA	2,553	1,631	256	666	5	3	1	0	1
23	22	Ohio Living	OH	2,716	1,605	455	656	12	9	1	0	2
24	24	Otterbein SeniorLife	OH	3,234	1,471	598	1,165	18	9	0	0	9
25	72	BHI Senior Living, Inc.	IN	2,808	1,248	1,011	549	9	9	0	0	0

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

2023 IL Rank	2022 IL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	25	National Church Residences	OH	2,078	1,215	716	147	13	3	1	9	0
27	26	Homewood Retirement Centers, Inc.	MD	1,905	1,163	291	451	5	4	1	0	0
28	27	Concordia Lutheran Ministries	PA	2,965	1,038	1,264	663	15	6	0	7	2
29	28	Buckner Retirement Services	TX	1,688	1,018	344	326	6	6	0	0	0
30	31	Presbyterian Villages of Michigan	MI	1,366	1,000	264	102	10	1	7	2	0
31	29	Baptist Village Communities	OK	1,415	933	257	225	11	2	8	1	0
32	30	Immanuel	NE	1,587	909	447	231	19	8	2	7	2
33	71	Life Enriching Communities	OH	1,686	907	408	371	6	6	0	0	0
34	35	Lifespire of Virginia	VA	1,441	887	327	227	5	5	0	0	0
35	32	Benedictine	MN	4,625	879	1,653	2,093	34	10	3	4	17
36	33	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
37	34	WesleyLife	IA	2,007	869	441	697	11	10	0	0	1
38	36	Presbyterian Manors of Mid-America	KS	2,099	851	538	710	15	14	0	1	0
39	37	Sequoia Living, Inc.	CA	1,116	844	136	136	4	4	0	0	0
40	38	United Church Homes, Inc.	OH	1,640	837	159	644	13	4	5	0	4
41	39	Ingleside	MD	1,112	832	157	123	3	3	0	0	0
42	40	Presbyterian Homes	IL	1,399	821	237	341	4	3	1	0	0
43	63	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	1	0
44	41	Friendship Village	MO	1,157	785	138	234	2	2	0	0	0
45	42	Mississippi Methodist Senior Services, Inc.	MS	1,450	776	354	320	12	2	8	0	2
46	44	Wesley	WA	1,163	765	214	184	4	0	4	0	0
47	48	Bethesda Health Group, Inc.	MO	1,701	761	78	862	13	0	7	2	4
48	45	Holland Home	MI	1,219	757	303	159	2	2	0	0	0
49	49	Givens Communities	NC	904	751	43	110	2	2	0	0	0
50	46	Franciscan Communities, Inc.	IL	1,804	744	479	581	8	4	1	3	0

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

2023 IL Rank	2022 IL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	43	Providence Life Services	IL	1,120	738	245	137	6	1	4	1	0
52	47	Blue Skies of Texas	TX	937	728	129	80	2	2	0	0	0
53	50	Mather	IL	848	712	59	77	3	2	1	0	0
54	73	Goodwin Living fka Goodwin House Incorporated	VA	996	704	119	173	3	3	0	0	0
55	51	Brightspire fka The Presbyterian Homes	NC	1,023	701	133	189	3	3	0	0	0
56	62	Lutheran Social Ministries of MD	MD	893	700	60	133	2	2	0	0	0
57	52	National Lutheran Communities and Services	MD	1,255	697	247	311	4	3	0	1	0
58	54	The RiverWoods Group	NH	967	681	242	44	3	3	0	0	0
59	53	Friendship Senior Options	IL	1,075	679	184	212	2	2	0	0	0
60	56	Greencroft Communities	IN	1,867	676	581	610	9	7	0	2	0
61	55	Brio Living Services fka UMRC and Porter Hills	MI	1,156	675	337	144	6	2	2	1	1
62	57	Hebrew SeniorLife	MA	1,542	654	115	773	4	2	1	0	1
63	58	Masonicare	CT	1,326	651	309	366	7	2	2	2	1
64	60	UMRH, Inc.	NC	976	640	140	196	3	3	0	0	0
65	61	Sun Health Services	AZ	866	637	114	115	3	3	0	0	0
66	59	Wesley Enhanced Living	PA	1,221	634	227	360	6	5	0	1	0
67	68	Diakon	PA	1,236	625	197	414	4	4	0	0	0
68	70	The Moorings, Incorporated	FL	838	625	107	106	3	1	2	0	0
69	64	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
70	65	Westminster-Canterbury on Chesapeake Bay	VA	799	611	80	108	2	1	1	0	0
71	76	Landis Communities	PA	868	610	155	103	4	1	2	1	0
72	69	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
73	74	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
74	75	Wesley Willows	IL	801	547	163	91	2	1	1	0	0
75	77	Pinnacle Living	VA	973	544	263	166	4	4	0	0	0

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

2023 IL Rank	2022 IL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	78	EveryAge	NC	959	541	90	328	3	3	0	0	0
77	79	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
78	132	Lutheran Services Carolinas	NC	1,757	519	334	904	10	3	1	0	6
79	82	Lutheran SeniorLife	PA	1,053	519	231	303	11	2	8	0	1
80	179	Bethesda Senior Living Communities	CO	2,171	513	1,658	0	21	0	5	16	0
81	80	Presbyterian SeniorCare Network	PA	1,589	508	405	676	7	7	0	0	0
82	84	Menno Haven, Inc.	PA	891	508	223	160	2	2	0	0	0
83	98	Brazos Presbyterian Homes Inc.	TX	697	503	91	103	3	3	0	0	0
84	83	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
85	85	LutherCare	PA	823	484	128	211	3	2	0	0	1
86	81	Sunnyside Communities	VA	773	484	155	134	3	3	0	0	0
87	110	St. Andrew's Resources for Seniors System	MO	938	474	183	281	6	2	2	1	1
88	NR	Well•Spring Group	NC	649	461	94	94	2	2	0	0	0
89	87	Living Branches	PA	834	459	232	143	3	2	0	1	0
90	88	Simpson Senior Services	PA	726	454	170	102	3	3	0	0	0
91	105	Haverland Carter Lifestyle Group	NM	971	451	390	130	4	2	0	2	0
92	89	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
93	90	Masonic Homes of Ky, Inc.	KY	887	449	181	257	3	2	1	0	0
94	91	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
95	92	Episcopal Communities & Services	CA	591	443	109	39	4	3	0	1	0
96	93	Eskaton	CA	1,580	442	652	486	12	1	1	7	3
97	86	Saint Therese	MN	886	438	160	288	5	3	1	1	0
98	100	Benevolent Corporation Cedar Community	WI	737	437	225	75	7	1	3	2	1
99	95	United Methodist Homes	NY	1,129	436	267	426	4	3	0	1	0
100	96	Morningside Ministries	TX	708	434	134	140	3	2	1	0	0

NR: Not Ranked in that year

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

2023 IL Rank	2022 IL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	111	Ecumen	MN	2,090	431	1,370	289	31	0	7	20	4
102	126	Baptist Senior Services	PA	573	426	84	63	2	1	1	0	0
103	104	Presbyterian Communities of South Carolina	SC	996	423	306	267	6	6	0	0	0
104	101	Christian Living Communities	CO	919	421	306	192	6	3	0	3	0
105	99	Lutheran Homes of South Carolina Inc.	SC	1,009	417	249	343	5	5	0	0	0
106	106	Lutheran Life Communities	IL	1,402	408	310	684	4	3	0	0	1
107	107	St. John's Home	NY	916	403	38	475	4	0	1	1	2
108	NR	Retirement Companies of America	TN	580	396	94	90	2	2	0	0	0
109	118	Friends Homes, Inc.	NC	603	394	100	109	2	2	0	0	0
110	109	Medford Leas	NJ	537	394	119	24	2	1	1	0	0
111	127	Sunset Senior Communities	MI	696	384	312	0	4	0	2	2	0
112	112	CRISTA Senior Living	WA	524	374	150	0	2	0	1	1	0
113	113	Phoebe Ministries	PA	1,179	370	275	534	4	4	0	0	0
114	115	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
115	116	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
116	94	Messiah Lifeways	PA	660	362	163	135	2	1	1	0	0
117	117	American Baptist Homes of the Midwest	MN	1,220	359	272	589	7	5	0	0	2
118	119	Loomis Communities Inc.	MA	454	357	55	42	3	3	0	0	0
119	102	Christian Horizons	MO	1,646	355	312	979	12	8	2	2	0
120	66	Christian Health	NJ	746	353	95	298	7	1	4	1	1
121	120	Rockwood Retirement Communities	WA	521	341	135	45	2	2	0	0	0
122	123	Episcopal SeniorLife Communities	NY	709	334	193	182	9	0	5	3	1
123	NR	FellowshipLIFE fka Fellowship Senior Living	NJ	550	331	152	67	2	2	0	0	0
124	124	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	3	3	0	0	0
125	125	Walker Methodist	MN	1,069	328	481	260	8	1	4	2	1

NR: Not Ranked in that year

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

2023 IL Rank	2022 IL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	128	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
127	130	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
128	129	Bluestem Communities	KS	541	320	63	158	2	2	0	0	0
129	131	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
130	133	Redstone Presbyterian SeniorCare	PA	524	304	143	77	3	1	2	0	0
131	134	Ohio Masonic Home	OH	676	302	242	132	3	2	0	1	0
132	135	The Legacy Senior Communities	TX	558	298	146	114	2	2	0	0	0
133	136	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
134	137	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	3	2	1	0	0
135	121	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
136	138	Samaritas	MI	761	293	120	348	5	1	2	0	2
137	>200	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	4	0	2	2	0
138	154	Illuminus fka Marquardt Village, Inc.	WI	810	287	283	240	5	2	1	1	1
139	139	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
140	140	Bethany Lutheran Homes Inc.	WI	726	282	321	123	10	2	1	6	1
141	142	Episcopal Retirement Services	OH	500	277	85	138	3	3	0	0	0
142	141	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
143	143	ThriveMore fka Baptist Retirement Homes of North Carolina, Inc.	NC	608	267	140	201	4	2	0	1	1
144	146	Willow Brook Christian Communities	OH	520	267	169	84	3	2	0	0	1
145	97	Christian Care Communities	KY	835	262	154	419	10	5	3	2	0
146	NR	Convivial Life Inc.	FL	424	243	181	0	2	1	0	1	0
147	145	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
148	147	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
149	148	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
150	149	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0

NR: Not Ranked in that year

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

2023 IL Rank	2022 IL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	NR	Futura Age fka eliseo and Foss Home	WA	733	221	114	398	2	1	0	0	1
152	150	Knute Nelson	MN	494	211	200	83	5	0	2	2	1
153	151	Loretto	NY	1,684	210	551	923	9	1	2	4	2
154	152	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
155	153	St. John's United	MT	546	204	167	175	5	4	0	1	0
156	160	Community First Solutions	OH	426	197	101	128	3	2	0	0	1
157	155	Good Shepherd Communities	NY	457	192	99	166	3	1	0	0	2
158	156	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
159	157	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
160	159	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
161	158	Beechwood Continuing Care, Inc.	NY	456	184	0	272	3	0	2	0	1
162	161	Lutheran Life Villages	IN	577	183	69	325	4	2	0	0	2
163	162	Allegheny Lutheran Social Ministries	PA	431	183	96	152	3	3	0	0	0
164	NR	St. Edward Home	OH	493	177	235	81	3	0	0	3	0
165	164	Eliza Jennings Senior Care Network	OH	506	176	114	216	3	1	0	1	1
166	163	Felician Services, Inc.	IL	974	172	257	545	8	2	2	1	3
167	165	Bethel	NY	563	170	130	263	5	1	1	1	2
168	166	The Lutheran Home Inc.	WI	455	170	98	187	2	0	1	0	1
169	167	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
170	168	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
171	169	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
172	181	South Carolina Baptist Ministry of Aging (SCBMA)	SC	398	139	83	176	2	2	0	0	0
173	192	Cassia	MN	3,668	138	2,144	1,386	47	0	2	28	17
174	173	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2
175	174	St. Paul's Senior Services	CA	482	134	289	59	4	0	1	2	1

NR: Not Ranked in that year

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

2023 IL Rank	2022 IL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	175	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
177	176	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
178	177	Wesbury	PA	418	117	91	210	2	1	1	0	0
179	178	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
180	171	Genacross Lutheran Services	OH	426	107	119	200	2	2	0	0	0
181	180	Vista Prairie Communities	MN	729	100	629	0	8	0	1	7	0
182	182	United Methodist Homes, Inc.	CT	507	90	297	120	3	1	0	2	0
183	170	Bethesda	MN	430	89	93	248	3	1	1	1	0
184	183	United Methodist Communities	NJ	882	88	546	248	4	1	0	3	0
185	184	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
186	185	Eventide	MN	1,077	65	460	552	6	5	0	1	0
187	186	The Carmelite System, Inc.	NY	2,898	51	498	2,349	15	1	0	3	11
188	188	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
189	189	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
190	190	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
191	191	Baruch Senior Ministries	MI	1,156	6	1,150	0	29	0	0	29	0
192	193	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
193	194	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
194	195	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
195	196	Alliance Health & Human Services	MA	861	0	0	861	7	0	0	0	7
196	197	Ebenezer Society	MN	753	0	443	310	8	0	0	6	2
197	NR	Ascentria Care Alliance	MA	673	0	57	616	5	0	0	0	5
198	198	LindenGrove Communities	WI	511	0	258	253	4	4	0	0	0
199	199	A.G. Rhodes	GA	413	0	0	413	3	0	0	0	3
200	200	Parker	NJ	407	0	60	347	6	0	0	1	5

NR: Not Ranked in that year

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

## Ranked by Total Assisted Living Units

2023 AL Rank	2022 AL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	Presbyterian Homes & Services	MN	9,646	5,307	2,867	1,472	54	16	37	0	1
2	3	The Evangelical Lutheran Good Samaritan Society	SD	15,820	5,155	2,242	8,423	124	52	7	19	46
3	2	Cassia	MN	3,668	138	2,144	1,386	47	0	2	28	17
4	4	National Senior Communities	VA	21,959	19,140	1,807	1,012	16	16	0	0	0
5	5	Bethesda Senior Living Communities	CO	2,171	513	1,658	0	21	0	5	16	0
6	6	Benedictine	MN	4,625	879	1,653	2,093	34	10	3	4	17
7	7	Ecumen	MN	2,090	431	1,370	289	31	0	7	20	4
8	8	Concordia Lutheran Ministries	PA	2,965	1,038	1,264	663	15	6	0	7	2
9	9	Ascension Living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
10	10	Trinity Health Senior Communities	MI	5,136	1,942	1,165	2,029	33	6	10	2	15
11	13	Baruch Senior Ministries	MI	1,156	6	1,150	0	29	0	0	29	0
12	11	Acts Retirement-Life Communities	PA	9,432	6,763	1,146	1,523	26	26	0	0	0
13	12	HumanGood	CA	5,817	3,580	1,141	1,096	22	21	1	0	0
14	18	BHI Senior Living, Inc.	IN	2,808	1,248	1,011	549	9	9	0	0	0
15	14	Covenant Living Communities & Services	IL	5,649	3,653	973	1,023	19	15	2	1	1
16	16	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
17	24	Lifespace Communities, Inc.	IA	5,958	4,046	785	1,127	17	17	0	0	0
18	17	Lutheran Senior Services	MO	3,446	1,741	731	974	9	8	0	1	0
19	19	National Church Residences	OH	2,078	1,215	716	147	13	3	1	9	0
20	20	Transforming Age	WA	2,543	1,759	706	78	18	3	11	4	0
21	25	Eskaton	CA	1,580	442	652	486	12	1	1	7	3
22	23	Vista Prairie Communities	MN	729	100	629	0	8	0	1	7	0
23	22	The Kendal Corporation	DE	3,380	2,329	616	435	10	8	1	0	1
24	21	Otterbein SeniorLife	OH	3,234	1,147	598	1,165	18	9	0	0	9
25	15	Retirement Housing Foundation	CA	2,576	1,707	594	275	10	5	5	0	0

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

### Ranked by Total Assisted Living Units

2023 AL Rank	2022 AL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	28	Presbyterian Senior Living	PA	3,124	1,655	594	875	15	11	3	1	0
27	26	Greencroft Communities	IN	1,867	676	581	610	9	7	0	2	0
28	27	Asbury Communities, Inc.	MD	3,565	2,215	560	790	9	9	0	0	0
29	32	Westminster Retirement Communities of Florida	FL	4,239	2,905	553	781	10	10	0	0	0
30	29	Loretto	NY	1,684	210	551	923	9	1	2	4	2
31	30	United Methodist Communities	NJ	882	88	546	248	4	1	0	3	0
32	31	Presbyterian Manors of Mid-America	KS	2,099	851	538	710	15	14	0	1	0
33	33	The Carmelite System, Inc.	NY	2,898	51	498	2,349	15	1	0	3	11
34	38	Walker Methodist	MN	1,069	328	481	260	8	1	4	2	1
35	49	Franciscan Communities, Inc.	IL	1,804	744	479	581	8	4	1	3	0
36	118	Front Porch Communities and Services	CA	4,223	3,023	477	723	19	10	9	0	0
37	35	Eventide	MN	1,077	65	460	552	6	5	0	1	0
38	43	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	1	0
39	36	Ohio Living	OH	2,716	1,605	455	656	12	9	1	0	2
40	37	Immanuel	NE	1,587	909	447	231	19	8	2	7	2
41	56	Ebenezer Society	MN	753	0	443	310	8	0	0	6	2
42	41	WesleyLife	IA	2,007	869	441	697	11	10	0	0	1
43	39	Christian Care Companies	AZ	2,164	1,687	409	68	6	0	5	0	1
44	109	Life Enriching Communities	OH	1,686	907	408	371	6	6	0	0	0
45	40	Presbyterian SeniorCare Network	PA	1,589	508	405	676	7	7	0	0	0
46	45	Haverland Carter Lifestyle Group	NM	971	451	390	130	4	2	0	2	0
47	66	Springpoint Senior Living	NJ	2,595	1,726	378	491	10	8	0	1	1
48	42	Pacific Retirement Services	OR	3,253	2,536	373	344	10	10	0	0	0
49	47	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
50	46	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6

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

### Ranked by Total Assisted Living Units

2023 AL Rank	2022 AL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	48	Mississippi Methodist Senior Services, Inc.	MS	1,450	776	354	320	12	2	8	0	2
52	50	Buckner Retirement Services	TX	1,688	1,018	344	326	6	6	0	0	0
53	51	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
54	52	Brio Living Services fka UMRC and Porter Hills	MI	1,156	675	337	144	6	2	2	1	1
55	70	Lutheran Services Carolinas	NC	1,757	519	334	904	10	3	1	0	6
56	54	Lifespire of Virginia	VA	1,441	887	327	227	5	5	0	0	0
57	55	Bethany Lutheran Homes Inc.	WI	726	282	321	123	10	2	1	6	1
58	57	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
59	58	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
60	63	Sunset Senior Communities	MI	696	384	312	0	4	0	2	2	0
61	62	Christian Horizons	MO	1,646	355	312	979	12	8	2	2	0
62	65	Lutheran Life Communities	IL	1,402	408	310	684	4	3	0	0	1
63	67	Masonicare	CT	1,326	651	309	366	7	2	2	2	1
64	64	Presbyterian Communities of South Carolina	SC	996	423	306	267	6	6	0	0	0
65	61	Christian Living Communities	CO	919	421	306	192	6	3	0	3	0
66	68	Holland Home	MI	1,219	757	303	159	2	2	0	0	0
67	69	United Methodist Homes, Inc.	CT	507	90	297	120	3	1	0	2	0
68	71	Homewood Retirement Centers, Inc.	MD	1,905	1,163	291	451	5	4	1	0	0
69	73	St. Paul's Senior Services	CA	482	134	289	59	4	0	1	2	1
70	72	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
71	85	Illuminus fka Marquardt Village, Inc.	WI	810	287	283	240	5	2	1	1	1
72	79	Phoebe Ministries	PA	1,179	370	275	534	4	4	0	0	0
73	75	American Baptist Homes of the Midwest	MN	1,220	359	272	589	7	5	0	0	2
74	76	United Methodist Homes	NY	1,129	436	267	426	4	3	0	1	0
75	74	Presbyterian Villages of Michigan	MI	1,366	1,000	264	102	10	1	7	2	0

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

### Ranked by Total Assisted Living Units

2023 AL Rank	2022 AL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	44	Pinnacle Living	VA	973	544	263	166	4	4	0	0	0
77	80	LindenGrove Communities	WI	511	0	258	253	4	4	0	0	0
78	81	Baptist Village Communities	OK	1,415	933	257	225	11	2	8	1	0
79	78	Felician Services, Inc.	IL	974	172	257	545	8	2	2	1	3
80	77	Masonic Villages of the Grand Lodge of PA	PA	2,553	1,631	256	666	5	3	1	0	1
81	82	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
82	84	Lutheran Homes of South Carolina Inc.	SC	1,009	417	249	343	5	5	0	0	0
83	83	National Lutheran Communities and Services	MD	1,255	697	247	311	4	3	0	1	0
84	60	Providence Life Services	IL	1,120	738	245	137	6	1	4	1	0
85	111	The RiverWoods Group	NH	967	681	242	44	3	3	0	0	0
86	86	Ohio Masonic Home	OH	676	302	242	132	3	2	0	1	0
87	88	Presbyterian Homes	IL	1,399	821	237	341	4	3	1	0	0
88	NR	St. Edward Home	OH	493	177	235	81	3	0	0	3	0
89	102	Willow Valley Communities	PA	2,212	1,638	232	342	3	3	0	0	0
90	91	Living Branches	PA	834	459	232	143	3	2	0	1	0
91	106	Lutheran SeniorLife	PA	1,053	519	231	303	11	2	8	0	1
92	93	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
93	90	Wesley Enhanced Living	PA	1,221	634	227	360	6	5	0	1	0
94	94	Benevolent Corporation Cedar Community	WI	737	437	225	75	7	1	3	2	1
95	95	Menno Haven, Inc.	PA	891	508	223	160	2	2	0	0	0
96	96	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
97	97	Wesley	WA	1,163	765	214	184	4	0	4	0	0
98	99	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
99	101	Knute Nelson	MN	494	211	200	83	5	0	2	2	1
100	105	Diakon	PA	1,236	625	197	414	4	4	0	0	0

NR: Not Ranked in that year

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

### Ranked by Total Assisted Living Units

2023 AL Rank	2022 AL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	103	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
102	104	Episcopal SeniorLife Communities	NY	709	334	193	182	9	0	5	3	1
103	107	Friendship Senior Options	IL	1,075	679	184	212	2	2	0	0	0
104	98	St. Andrew's Resources for Seniors System	MO	938	474	183	281	6	2	2	1	1
105	100	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
106	127	Masonic Homes of Ky, Inc.	KY	887	449	181	257	3	2	1	0	0
107	NR	Convivial Life Inc.	FL	424	243	181	0	2	1	0	1	0
108	112	Simpson Senior Services	PA	726	454	170	102	3	3	0	0	0
109	53	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
110	152	Willow Brook Christian Communities	OH	520	267	169	84	3	2	0	0	1
111	113	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
112	114	St. John's United	MT	546	204	167	175	5	4	0	1	0
113	116	Wesley Willows	IL	801	547	163	91	2	1	1	0	0
114	115	Messiah Lifeways	PA	660	362	163	135	2	1	1	0	0
115	146	Saint Therese	MN	886	438	160	288	5	3	1	1	0
116	87	United Church Homes, Inc.	OH	1,640	837	159	644	13	4	5	0	4
117	120	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2
118	121	Ingleside	MD	1,112	832	157	123	3	3	0	0	0
119	123	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
120	117	Landis Communities	PA	868	610	155	103	4	1	2	1	0
121	122	Sunnyside Communities	VA	773	484	155	134	3	3	0	0	0
122	125	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
123	110	Christian Care Communities	KY	835	262	154	419	10	5	3	2	0
124	NR	FellowshipLIFE fka Fellowship Senior Living	NJ	550	331	152	67	2	2	0	0	0
125	126	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0

NR: Not Ranked in that year

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

### Ranked by Total Assisted Living Units

2023 AL Rank	2022 AL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	128	CRISTA Senior Living	WA	524	374	150	0	2	0	1	1	0
127	129	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	3	3	0	0	0
128	130	The Legacy Senior Communities	TX	558	298	146	114	2	2	0	0	0
129	131	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
130	132	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
131	143	Redstone Presbyterian SeniorCare	PA	524	304	143	77	3	1	2	0	0
132	133	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
133	134	UMRH, Inc.	NC	976	640	140	196	3	3	0	0	0
134	135	ThriveMore fka Baptist Retirement Homes of North Carolina, Inc.	NC	608	267	140	201	4	2	0	1	1
135	138	Friendship Village	MO	1,157	785	138	234	2	2	0	0	0
136	137	Sequoia Living, Inc.	CA	1,116	844	136	136	4	4	0	0	0
137	147	Rockwood Retirement Communities	WA	521	341	135	45	2	2	0	0	0
138	139	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
139	142	Morningside Ministries	TX	708	434	134	140	3	2	1	0	0
140	145	Brightspire fka The Presbyterian Homes	NC	1,023	701	133	189	3	3	0	0	0
141	148	Bethel	NY	563	170	130	263	5	1	1	1	2
142	149	Blue Skies of Texas	TX	937	728	129	80	2	2	0	0	0
143	150	LutherCare	PA	823	484	128	211	3	2	0	0	1
144	151	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
145	156	Samaritas	MI	761	293	120	348	5	1	2	0	2
146	154	Goodwin Living fka Goodwin House Incorporated	VA	996	704	119	173	3	3	0	0	0
147	157	Medford Leas	NJ	537	394	119	24	2	1	1	0	0
148	140	Genacross Lutheran Services	OH	426	107	119	200	2	2	0	0	0
149	158	Hebrew SeniorLife	MA	1,542	654	115	773	4	2	1	0	1
150	159	Sun Health Services	AZ	866	637	114	115	3	3	0	0	0

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

### Ranked by Total Assisted Living Units

2023 AL Rank	2022 AL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	NR	Futura Age fka eliseo and Foss Home	WA	733	221	114	398	2	1	0	0	1
152	175	Eliza Jennings Senior Care Network	OH	506	176	114	216	3	1	0	1	1
153	162	Episcopal Communities & Services	CA	591	443	109	39	4	3	0	1	0
154	161	The Moorings, Incorporated	FL	838	625	107	106	3	1	2	0	0
155	163	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
156	164	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
157	>200	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	4	0	2	2	0
158	166	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
159	167	Community First Solutions	OH	426	197	101	128	3	2	0	0	1
160	168	Friends Homes, Inc.	NC	603	394	100	109	2	2	0	0	0
161	169	Good Shepherd Communities	NY	457	192	99	166	3	1	0	0	2
162	165	The Lutheran Home Inc.	WI	455	170	98	187	2	0	1	0	1
163	170	Allegheny Lutheran Social Ministries	PA	431	183	96	152	3	3	0	0	0
164	141	Christian Health	NJ	746	353	95	298	7	1	4	1	1
165	NR	Well•Spring Group	NC	649	461	94	94	2	2	0	0	0
166	NR	Retirement Companies of America	TN	580	396	94	90	2	2	0	0	0
167	153	Bethesda	MN	430	89	93	248	3	1	1	1	0
168	155	Brazos Presbyterian Homes Inc.	TX	697	503	91	103	3	3	0	0	0
169	172	Wesbury	PA	418	117	91	210	2	1	1	0	0
170	173	EveryAge	NC	959	541	90	328	3	3	0	0	0
171	174	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
172	160	Episcopal Retirement Services	OH	500	277	85	138	3	3	0	0	0
173	136	Baptist Senior Services	PA	573	426	84	63	2	1	1	0	0
174	144	South Carolina Baptist Ministry of Aging (SCBMA)	SC	398	139	83	176	2	2	0	0	0
175	176	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2

NR: Not Ranked in that year

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

### Ranked by Total Assisted Living Units

2023 AL Rank	2022 AL Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	177	Westminster-Canterbury on Chesapeake Bay	VA	799	611	80	108	2	1	1	0	0
177	178	Bethesda Health Group, Inc.	MO	1,701	761	78	862	13	0	7	2	4
178	179	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	3	2	1	0	0
179	181	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
180	182	Lutheran Life Villages	IN	577	183	69	325	4	2	0	0	2
181	184	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
182	183	Bluestem Communities	KS	541	320	63	158	2	2	0	0	0
183	180	Lutheran Social Ministries of MD	MD	893	700	60	133	2	2	0	0	0
184	185	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
185	186	Parker	NJ	407	0	60	347	6	0	0	1	5
186	187	Mather	IL	848	712	59	77	3	2	1	0	0
187	188	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
188	190	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
189	NR	Ascentria Care Alliance	MA	673	0	57	616	5	0	0	0	5
190	189	Loomis Communities Inc.	MA	454	357	55	42	3	3	0	0	0
191	192	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
192	191	Givens Communities	NC	904	751	43	110	2	2	0	0	0
193	193	St. John's Home	NY	916	403	38	475	4	0	1	1	2
194	194	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
195	196	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
196	195	Beechwood Continuing Care, Inc.	NY	456	184	0	272	3	0	2	0	1
197	197	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
198	198	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
199	199	Alliance Health & Human Services	MA	861	0	0	861	7	0	0	0	7
200	200	A.G. Rhodes	GA	413	0	0	413	3	0	0	0	3

NR: Not Ranked in that year

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

## Ranked by Nursing Care Beds

2023 NCB Rank	2022 NCB Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	The Evangelical Lutheran Good Samaritan Society	SD	15,820	5,155	2,242	8,423	124	52	7	19	46
2	2	Ascension Living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
3	3	The Carmelite System, Inc.	NY	2,898	51	498	2,349	15	1	0	3	11
4	4	Benedictine	MN	4,625	879	1,653	2,093	34	10	3	4	17
5	5	Trinity Health Senior Communities	MI	5,136	1,942	1,165	2,029	33	6	10	2	15
6	6	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
7	8	Acts Retirement-Life Communities	PA	9,432	6,763	1,146	1,523	26	26	0	0	0
8	7	Presbyterian Homes & Services	MN	9,646	5,307	2,867	1,472	54	16	37	0	1
9	10	Cassia	MN	3,668	138	2,144	1,386	47	0	2	28	17
10	11	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
11	12	Otterbein SeniorLife	OH	3,234	1,147	598	1,165	18	9	0	0	9
12	18	Lifespace Communities, Inc.	IA	5,958	4,046	785	1,127	17	17	0	0	0
13	13	HumanGood	CA	5,817	3,580	1,141	1,096	22	21	1	0	0
14	15	Covenant Living Communities & Services	IL	5,649	3,653	973	1,023	19	15	2	1	1
15	16	National Senior Communities	VA	21,959	19,140	1,807	1,012	16	16	0	0	0
16	17	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
17	9	Christian Horizons	MO	1,646	355	312	979	12	8	2	2	0
18	14	Lutheran Senior Services	MO	3,446	1,741	731	974	9	8	0	1	0
19	19	Loretto	NY	1,684	210	551	923	9	1	2	4	2
20	30	Lutheran Services Carolinas	NC	1,757	519	334	904	10	3	1	0	6
21	26	Presbyterian Senior Living	PA	3,124	1,655	594	875	15	11	3	1	0
22	21	Bethesda Health Group, Inc.	MO	1,701	761	78	862	13	0	7	2	4
23	23	Alliance Health & Human Services	MA	861	0	0	861	7	0	0	0	7
24	25	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
25	24	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2

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

### Ranked by Nursing Care Beds

2023 NCB Rank	2022 NCB Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	20	Asbury Communities, Inc.	MD	3,565	2,215	560	790	9	9	0	0	0
27	27	Westminster Retirement Communities of Florida	FL	4,239	2,905	553	781	10	10	0	0	0
28	33	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
29	28	Hebrew SeniorLife	MA	1,542	654	115	773	4	2	1	0	1
30	39	Front Porch Communities and Services	CA	4,223	3,023	477	723	19	10	9	0	0
31	29	Presbyterian Manors of Mid-America	KS	2,099	851	538	710	15	14	0	1	0
32	31	WesleyLife	IA	2,007	869	441	697	11	10	0	0	1
33	34	Lutheran Life Communities	IL	1,402	408	310	684	4	3	0	0	1
34	35	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
35	37	Presbyterian SeniorCare Network	PA	1,589	508	405	676	7	7	0	0	0
36	36	Masonic Villages of the Grand Lodge of PA	PA	2,553	1,631	256	666	5	3	1	0	1
37	38	Concordia Lutheran Ministries	PA	2,965	1,038	1,264	663	15	6	0	7	2
38	22	Ohio Living	OH	2,716	1,605	455	656	12	9	1	0	2
39	32	United Church Homes, Inc.	OH	1,640	837	159	644	13	4	5	0	4
40	NR	Ascentria Care Alliance	MA	673	0	57	616	5	0	0	0	5
41	40	Greencroft Communities	IN	1,867	676	581	610	9	7	0	2	0
42	43	American Baptist Homes of the Midwest	MN	1,220	359	272	589	7	5	0	0	2
43	41	Franciscan Communities, Inc.	IL	1,804	744	479	581	8	4	1	3	0
44	44	Eventide	MN	1,077	65	460	552	6	5	0	1	0
45	66	BHI Senior Living, Inc.	IN	2,808	1,248	1,011	549	9	9	0	0	0
46	57	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
47	45	Felician Services, Inc.	IL	974	172	257	545	8	2	2	1	3
48	46	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	3	2	1	0	0
49	47	Phoebe Ministries	PA	1,179	370	275	534	4	4	0	0	0
50	48	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2

NR: Not Ranked in that year

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

2023 NCB Rank	2022 NCB Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	49	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
52	50	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
53	51	Springpoint Senior Living	NJ	2,595	1,726	378	491	10	8	0	1	1
54	53	Eskaton	CA	1,580	442	652	486	12	1	1	7	3
55	54	St. John's Home	NY	916	403	38	475	4	0	1	1	2
56	55	Homewood Retirement Centers, Inc.	MD	1,905	1,163	291	451	5	4	1	0	0
57	52	The Kendal Corporation	DE	3,380	2,329	616	435	10	8	1	0	1
58	56	United Methodist Homes	NY	1,129	436	267	426	4	3	0	1	0
59	61	Christian Care Communities	KY	835	262	154	419	10	5	3	2	0
60	59	Diakon	PA	1,236	625	197	414	4	4	0	0	0
61	58	A.G. Rhodes	GA	413	0	0	413	3	0	0	0	3
62	NR	Futura Age fka eliseo and Foss Home	WA	733	221	114	398	2	1	0	0	1
63	62	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
64	96	Life Enriching Communities	OH	1,686	907	408	371	6	6	0	0	0
65	63	Masonicare	CT	1,326	651	309	366	7	2	2	2	1
66	65	Wesley Enhanced Living	PA	1,221	634	227	360	6	5	0	1	0
67	68	Samaritas	MI	761	293	120	348	5	1	2	0	2
68	69	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
69	70	Parker	NJ	407	0	60	347	6	0	0	1	5
70	60	Pacific Retirement Services	OR	3,253	2,536	373	344	10	10	0	0	0
71	71	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
72	67	Lutheran Homes of South Carolina Inc.	SC	1,009	417	249	343	5	5	0	0	0
73	85	Willow Valley Communities	PA	2,212	1,638	232	342	3	3	0	0	0
74	73	Presbyterian Homes	IL	1,399	821	237	341	4	3	1	0	0
75	74	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4

NR: Not Ranked in that year

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

2023 NCB Rank	2022 NCB Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	75	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	3	3	0	0	0
77	77	EveryAge	NC	959	541	90	328	3	3	0	0	0
78	78	Buckner Retirement Services	TX	1,688	1,018	344	326	6	6	0	0	0
79	80	Lutheran Life Villages	IN	577	183	69	325	4	2	0	0	2
80	81	Mississippi Methodist Senior Services, Inc.	MS	1,450	776	354	320	12	2	8	0	2
81	83	National Lutheran Communities and Services	MD	1,255	697	247	311	4	3	0	1	0
82	104	Ebenezer Society	MN	753	0	443	310	8	0	0	6	2
83	84	Lutheran SeniorLife	PA	1,053	519	231	303	11	2	8	0	1
84	86	Christian Health	NJ	746	353	95	298	7	1	4	1	1
85	87	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	1	0
86	72	Ecumen	MN	2,090	431	1,370	289	31	0	7	20	4
87	64	Saint Therese	MN	886	438	160	288	5	3	1	1	0
88	88	St. Andrew's Resources for Seniors System	MO	938	474	183	281	6	2	2	1	1
89	92	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
90	42	Retirement Housing Foundation	CA	2,576	1,707	594	275	10	5	5	0	0
91	95	Beechwood Continuing Care, Inc.	NY	456	184	0	272	3	0	2	0	1
92	94	Presbyterian Communities of South Carolina	SC	996	423	306	267	6	6	0	0	0
93	97	Bethel	NY	563	170	130	263	5	1	1	1	2
94	98	Walker Methodist	MN	1,069	328	481	260	8	1	4	2	1
95	89	Masonic Homes of Ky, Inc.	KY	887	449	181	257	3	2	1	0	0
96	99	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
97	100	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
98	101	LindenGrove Communities	WI	511	0	258	253	4	4	0	0	0
99	102	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
100	103	United Methodist Communities	NJ	882	88	546	248	4	1	0	3	0

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

2023 NCB Rank	2022 NCB Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	93	Bethesda	MN	430	89	93	248	3	1	1	1	0
102	105	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
103	76	Illuminus fka Marquardt Village, Inc.	WI	810	287	283	240	5	2	1	1	1
104	107	Friendship Village	MO	1,157	785	138	234	2	2	0	0	0
105	108	Immanuel	NE	1,587	909	447	231	19	8	2	7	2
106	109	Lifespire of Virginia	VA	1,441	887	327	227	5	5	0	0	0
107	79	Baptist Village Communities	OK	1,415	933	257	225	11	2	8	1	0
108	111	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
109	112	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
110	110	Eliza Jennings Senior Care Network	OH	506	176	114	216	3	1	0	1	1
111	106	Friendship Senior Options	IL	1,075	679	184	212	2	2	0	0	0
112	113	LutherCare	PA	823	484	128	211	3	2	0	0	1
113	114	Wesbury	PA	418	117	91	210	2	1	1	0	0
114	115	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
115	118	ThriveMore fka Baptist Retirement Homes of North Carolina, Inc.	NC	608	267	140	201	4	2	0	1	1
116	130	Genacross Lutheran Services	OH	426	107	119	200	2	2	0	0	0
117	120	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
118	121	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
119	117	UMRH, Inc.	NC	976	640	140	196	3	3	0	0	0
120	123	Christian Living Communities	CO	919	421	306	192	6	3	0	3	0
121	126	Brightspire fka The Presbyterian Homes	NC	1,023	701	133	189	3	3	0	0	0
122	127	The Lutheran Home Inc.	WI	455	170	98	187	2	0	1	0	1
123	131	Wesley	WA	1,163	765	214	184	4	0	4	0	0
124	132	Episcopal SeniorLife Communities	NY	709	334	193	182	9	0	5	3	1
125	133	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2

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

### Ranked by Nursing Care Beds

2023 NCB Rank	2022 NCB Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	135	South Carolina Baptist Ministry of Aging (SCBMA)	SC	398	139	83	176	2	2	0	0	0
127	129	St. John's United	MT	546	204	167	175	5	4	0	1	0
128	146	Goodwin Living fka Goodwin House Incorporated	VA	996	704	119	173	3	3	0	0	0
129	136	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
130	124	Pinnacle Living	VA	973	544	263	166	4	4	0	0	0
131	138	Good Shepherd Communities	NY	457	192	99	166	3	1	0	0	2
132	139	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
133	141	Menno Haven, Inc.	PA	891	508	223	160	2	2	0	0	0
134	142	Holland Home	MI	1,219	757	303	159	2	2	0	0	0
135	143	Bluestem Communities	KS	541	320	63	158	2	2	0	0	0
136	144	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
137	145	Allegheny Lutheran Social Ministries	PA	431	183	96	152	3	3	0	0	0
138	147	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
139	148	National Church Residences	OH	2,078	1,215	716	147	13	3	1	9	0
140	128	Brio Living Services fka UMRC and Porter Hills	MI	1,156	675	337	144	6	2	2	1	1
141	149	Living Branches	PA	834	459	232	143	3	2	0	1	0
142	150	Morningside Ministries	TX	708	434	134	140	3	2	1	0	0
143	151	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
144	122	Episcopal Retirement Services	OH	500	277	85	138	3	3	0	0	0
145	91	Providence Life Services	IL	1,120	738	245	137	6	1	4	1	0
146	152	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
147	153	Sequoia Living, Inc.	CA	1,116	844	136	136	4	4	0	0	0
148	154	Messiah Lifeways	PA	660	362	163	135	2	1	1	0	0
149	155	Sunnyside Communities	VA	773	484	155	134	3	3	0	0	0
150	165	Lutheran Social Ministries of MD	MD	893	700	60	133	2	2	0	0	0

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

2023 NCB Rank	2022 NCB Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	140	Ohio Masonic Home	OH	676	302	242	132	3	2	0	1	0
152	172	Haverland Carter Lifestyle Group	NM	971	451	390	130	4	2	0	2	0
153	156	Community First Solutions	OH	426	197	101	128	3	2	0	0	1
154	158	Bethany Lutheran Homes Inc.	WI	726	282	321	123	10	2	1	6	1
155	159	Ingleside	MD	1,112	832	157	123	3	3	0	0	0
156	160	United Methodist Homes, Inc.	CT	507	90	297	120	3	1	0	2	0
157	161	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
158	163	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
159	164	Sun Health Services	AZ	866	637	114	115	3	3	0	0	0
160	166	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
161	167	The Legacy Senior Communities	TX	558	298	146	114	2	2	0	0	0
162	169	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
163	168	Givens Communities	NC	904	751	43	110	2	2	0	0	0
164	170	Friends Homes, Inc.	NC	603	394	100	109	2	2	0	0	0
165	171	Westminster-Canterbury on Chesapeake Bay	VA	799	611	80	108	2	1	1	0	0
166	174	The Moorings, Incorporated	FL	838	625	107	106	3	1	2	0	0
167	175	Landis Communities	PA	868	610	155	103	4	1	2	1	0
168	119	Brazos Presbyterian Homes Inc.	TX	697	503	91	103	3	3	0	0	0
169	176	Presbyterian Villages of Michigan	MI	1,366	1,000	264	102	10	1	7	2	0
170	134	Simpson Senior Services	PA	726	454	170	102	3	3	0	0	0
171	NR	Well•Spring Group	NC	649	461	94	94	2	2	0	0	0
172	178	Wesley Willows	IL	801	547	163	91	2	1	1	0	0
173	179	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
174	180	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
175	NR	Retirement Companies of America	TN	580	396	94	90	2	2	0	0	0

NR: Not Ranked in that year

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

### Ranked by Nursing Care Beds

2023 NCB Rank	2022 NCB Rank	System Name	State	Units (as of 12/31/22)				Communities (as of 12/31/22)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	182	Willow Brook Christian Communities	OH	520	267	169	84	3	2	0	0	1
177	183	Knute Nelson	MN	494	211	200	83	5	0	2	2	1
178	NR	St. Edward Home	OH	493	177	235	81	3	0	0	3	0
179	157	Blue Skies of Texas	TX	937	728	129	80	2	2	0	0	0
180	184	Transforming Age	WA	2,543	1,759	706	78	18	3	11	4	0
181	185	Redstone Presbyterian SeniorCare	PA	524	304	143	77	3	1	2	0	0
182	186	Mather	IL	848	712	59	77	3	2	1	0	0
183	181	Benevolent Corporation Cedar Community	WI	737	437	225	75	7	1	3	2	1
184	187	Christian Care Companies	AZ	2,164	1,687	409	68	6	0	5	0	1
185	NR	FellowshipLIFE fka Fellowship Senior Living	NJ	550	331	152	67	2	2	0	0	0
186	125	Baptist Senior Services	PA	573	426	84	63	2	1	1	0	0
187	189	St. Paul's Senior Services	CA	482	134	289	59	4	0	1	2	1
188	190	Rockwood Retirement Communities	WA	521	341	135	45	2	2	0	0	0
189	177	The RiverWoods Group	NH	967	681	242	44	3	3	0	0	0
190	191	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
191	192	Loomis Communities Inc.	MA	454	357	55	42	3	3	0	0	0
192	193	Episcopal Communities & Services	CA	591	443	109	39	4	3	0	1	0
193	195	Medford Leas	NJ	537	394	119	24	2	1	1	0	0
194	196	Bethesda Senior Living Communities	CO	2,171	513	1,658	0	21	0	5	16	0
195	197	Baruch Senior Ministries	MI	1,156	6	1,150	0	29	0	0	29	0
196	198	Vista Prairie Communities	MN	729	100	629	0	8	0	1	7	0
197	199	Sunset Senior Communities	MI	696	384	312	0	4	0	2	2	0
198	NR	Convivial Life Inc.	FL	424	243	181	0	2	1	0	1	0
199	200	CRISTA Senior Living	WA	524	374	150	0	2	0	1	1	0
200	>200	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	4	0	2	2	0

NR: Not Ranked in that year

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

## *The Over 200*

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

### Over 200 (387 and fewer Total Units)

ACC Senior Services (CA)

Bethany Life (IA)

Catholic Eldercare (MN)

Evergreen Retirement Community (WI)

Los Angeles Jewish Home (CA)

Milwaukee Catholic Home (WI)

Morningstar Senior Living (PA)

Resthaven (MI)

Silverstone Living (NH)

Tabitha Health Care Services (NE)

Three Pillars Senior Living Communities (WI)

### Over 200 (302 and fewer Total Units)

Baptist Homes (MO)

Bethel Home & Services (WI)

Christian Community Homes and Services (WI)

Crest View Senior Communities (MN)

Masonic Homes of California (CA)

Miravida (WI)

Perry Lutheran Homes (IA)

Saint Elizabeth Community (RI)

Taylor Community (NH)

Wesley Woods Senior Living (GA)

Woodhaven Retirement Community (MI)

## The Rankings: Change at a Glance

### *Greatest Changes in Units*

Greatest Increase and Decrease	State	YE 2022 Units	YE 2021 Units	Change
<b>Greatest Increase</b>				
BHI Senior Living	IN	2,808	1,705	+1103
Lifespace Communities	IA	5,958	5,279	+679
Life Enriching Communities	OH	1,686	1,039	+647
Bethesda Senior Living	CO	2,171	1,707	+464
Lutheran Services Carolinas	NC	1,757	1,338	+419
<b>Greatest Decrease</b>				
Retirement Housing Foundation	CA	2,576	4,139	-1,563
Christian Horizons	MO	1,646	2,215	-569
Lutheran Senior Services	MO	3,446	3,704	-258
Providence Life Services	MO	1,120	1,361	-241
Ohio Living	OH	2,716	2,898	-182

## The Rankings: Change at a Glance

### *Greatest Changes in Rank*

Greatest Upward and Downward Change	State	2023 Rank	2022 Rank	Change
<b>Greatest Upward Movement</b>				
Life Enriching Communities	OH	44	83	+39
Ebenezer Society	MN	126	158	+32
Goodwin Living	VA	85	107	+22
BHI Senior Living	IN	22	40	+18
Lutheran Services Carolinas	NC	40	57	+17
<b>Greatest Downward Movement</b>				
Providence Life Services	IL	76	56	-20
Christian Horizons	MO	46	28	-18
Pinnacle Living	VA	90	75	-15
Retirement Housing Foundation	CA	25	12	-13
Messiah Lifeways	PA	143	132	-11



# Chapter 4

## *Analysis of the Data*

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

### *Units*

The first analysis of the 2023 LZ 200 provides a side-by-side comparison of the unit mix for 2022 compared to 2021 for each of the organizations. The 2023 LZ 200 organizations own more than 300,000 market-rate senior living units. By breaking the data into the largest 10, 25, 50, 100 and 150 (Chart 4-1c), it is evident that the ratio of units held by the largest 50 compared with the percentage of total units in the LZ 200 is not balanced, e.g., the largest 50

systems hold slightly more than 60% of the total units. The 10 largest systems own 30% of the total LZ 200 units. The average system within the 2023 LZ 200 reported nearly 1,534 units in 2022 (Chart 4-1b). Slightly more than 44% of the 2023 LZ 200's total communities are Life Plan Communities, with the nearly 56% evenly divided between stand-alone ILs, ALs, and NHs.

**Summary of Not-for-Profit Units.** These columns show the total number of units, followed by a breakdown of this total by level of care for each system. The first set of columns show the unit mix as of 12/31/22. The second set of columns show the unit mix as of 12/31/21.

**Change in Total Units from 2021 to 2022.** This column provides the change in the listed organization's TOTAL market-rate units (all levels of care) between year-end 2022 and year-end 2021.

Section 4-1b provides two examinations of three-year comparisons of the LZ 200 organizations. The first table details the total number of units by level of care among the largest 10, 25, 50, 100, 150 and 200 organizations. The

percentage of total units is detailed in 4-1b as well as 4-1c. This section also examines the unit mix between each of the five years' LZ 200 listings. Chart 4-1d provides a more graphic illustration of the type of change occurring in the LZ 200. For all the year-over-year comparisons made in 4.1b-4.1e, note the increase to 200 as part of the 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022 and 2023 publications. In some instances, two figures are calculated for the current publication, one that reflects the largest 100, 150 and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 200 listing.

### *Communities*

The unit analysis presented in Chart 4-1a is followed by a side-by-side comparison in Chart 4-2a of the community portfolios of the 2023 LZ 200 for 2022 compared to their portfolios at the end of 2021.

**Summary of Not-for-Profit Communities.** Community, as noted earlier, is the term used to refer to any type of community owned by the LZ 200, whether stand-alone nursing home (NH), assisted living community (AL), independent

living community (IL), or Life Plan Community (LPC). Again, government-subsidized (affordable) housing properties are excluded from the count of communities shown for the LZ 200 (these properties are examined in Chapter 4). The first set of columns in Chart 4-2a shows the communities owned, by type, as of 12/31/22. The second set of columns shows the communities owned, by type, as of 12/31/21.

**Change in Total Communities from 2021 to 2022.** This column provides the change in the listed organization's TOTAL communities (all types, excluding affordable housing) between year-end 2021 and year-end 2022. Chart 4-2b provides two examinations of three-year comparisons of the LZ 200 organizations. The first half of the chart examines the community holdings between each of the five years' LZ 200 listings. As with the year-over-year unit comparisons, in some instances, two figures are calculated for the current publication, one that reflects the largest 150 and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 200 listing.

## Organizational Characteristics: Units Rank Detailed by Units (2022 vs. 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2021 to 2022
				2022 Units				2021 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	1	National Senior Communities	VA	21,959	19,140	1,807	1,012	21,753	19,026	1,720	1,007	206
2	2	The Evangelical Lutheran Good Samaritan Society	SD	15,820	5,155	2,242	8,423	15,447	4,795	2,110	8,542	373
3	4	Presbyterian Homes & Services	MN	9,646	5,307	2,867	1,472	9,391	5,027	2,792	1,572	255
4	3	Acts Retirement-Life Communities	PA	9,432	6,763	1,146	1,523	9,404	6,739	1,139	1,526	28
5	5	Ascension Living	MO	6,692	1,800	1,203	3,689	6,692	1,800	1,203	3,689	0
6	8	Lifespace Communities, Inc.	IA	5,958	4,046	785	1,127	5,279	3,635	672	972	679
7	6	HumanGood	CA	5,817	3,580	1,141	1,096	5,821	3,586	1,138	1,097	-4
8	7	Covenant Living Communities & Services	IL	5,649	3,653	973	1,023	5,432	3,499	906	1,027	217
9	9	Trinity Health Senior Communities	MI	5,136	1,942	1,165	2,029	5,136	1,942	1,165	2,029	0
10	10	Benedictine	MN	4,625	879	1,653	2,093	4,576	879	1,569	2,128	49
11	11	Westminster Retirement Communities of Florida	FL	4,239	2,905	553	781	4,224	2,924	519	781	15
12	13	Front Porch Communities and Services	CA	4,223	3,023	477	723	4,136	3,323	159	654	87
13	16	Cassia	MN	3,668	138	2,144	1,386	3,509	0	2,129	1,380	159
14	15	Asbury Communities, Inc.	MD	3,565	2,215	560	790	3,686	2,215	562	909	-121
15	14	Lutheran Senior Services	MO	3,446	1,741	731	974	3,704	1,825	792	1,087	-258
16	17	The Kendal Corporation	DE	3,380	2,329	616	435	3,505	2,321	697	487	-125
17	18	Pacific Retirement Services	OR	3,253	2,536	373	344	3,364	2,561	398	405	-111
18	20	Otterbein SeniorLife	OH	3,234	1,471	598	1,165	3,182	1,353	699	1,130	52
19	19	Presbyterian Senior Living	PA	3,124	1,655	594	875	3,186	1,831	556	799	-62
20	21	Concordia Lutheran Ministries	PA	2,965	1,038	1,264	663	2,965	1,038	1,264	663	0
21	23	The Carmelite System, Inc.	NY	2,898	51	498	2,349	2,898	51	498	2,349	0
22	40	BHI Senior Living, Inc.	IN	2,808	1,248	1,011	549	1,705	580	773	352	1,103
23	22	Ohio Living	OH	2,716	1,605	455	656	2,898	1,620	454	824	-182
24	26	Springpoint Senior Living	NJ	2,595	1,726	378	491	2,532	1,732	309	491	63
25	12	Retirement Housing Foundation	CA	2,576	1,707	594	275	4,139	2,642	886	611	-1,563

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2022 vs. 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2021 to 2022
				2022 Units				2021 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	24	Masonic Villages of the Grand Lodge of PA	PA	2,553	1,631	256	666	2,576	1,624	269	683	-23
27	25	Transforming Age	WA	2,543	1,759	706	78	2,543	1,759	706	78	0
28	27	Volunteers of America	VA	2,484	604	873	1,007	2,484	604	873	1,007	0
29	32	Willow Valley Communities	PA	2,212	1,638	232	342	2,095	1,597	198	300	117
30	39	Bethesda Senior Living Communities	CO	2,171	513	1,658	0	1,707	111	1,596	0	464
31	29	Christian Care Companies	AZ	2,164	1,687	409	68	2,164	1,687	409	68	0
32	30	Presbyterian Manors of Mid-America	KS	2,099	851	538	710	2,130	850	538	742	-31
33	31	Ecumen	MN	2,090	431	1,370	289	2,109	376	1,391	342	-19
34	33	National Church Residences	OH	2,078	1,215	716	147	2,078	1,215	716	147	0
35	34	WesleyLife	IA	2,007	869	441	697	1,968	869	399	700	39
36	35	Homewood Retirement Centers. Inc.	MD	1,905	1,163	291	451	1,897	1,157	289	451	8
37	36	Greencroft Communities	IN	1,867	676	581	610	1,874	668	582	624	-7
38	41	Franciscan Communities, Inc.	IL	1,804	744	479	581	1,704	744	345	615	100
39	37	ArchCare	NY	1,782	0	59	1,723	1,782	0	59	1,723	0
40	57	Lutheran Services Carolinas	NC	1,757	519	1,238	0	1,338	311	295	732	419
41	45	Bethesda Health Group, Inc.	MO	1,701	761	78	862	1,667	727	78	862	34
42	42	Covenant Health	MA	1,696	0	364	1,332	1,696	0	364	1,332	0
43	43	Buckner Retirement Services	TX	1,688	1,018	344	326	1,688	1,018	344	326	0
44	83	Life Enriching Communities	OH	1,686	907	408	371	1,039	592	182	265	647
45	44	Loretto	NY	1,684	210	551	923	1,684	210	551	923	0
46	28	Christian Horizons	MO	1,646	355	312	979	2,215	417	312	1,486	-569
47	38	United Church Homes, Inc.	OH	1,640	837	159	644	1,775	837	239	699	-135
48	46	Presbyterian SeniorCare Network	PA	1,589	508	405	676	1,595	514	405	676	-6
49	47	Immanuel	NE	1,587	909	447	231	1,589	911	447	231	-2
50	48	Eskaton	CA	1,580	442	652	486	1,568	442	640	486	12

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2022 vs. 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2021 to 2022
				2022 Units				2021 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	59	Methodist Retirement Communities	TX	1,549	798	457	294	1,316	629	393	294	233
52	49	Hebrew SeniorLife	MA	1,542	654	115	773	1,542	654	115	773	0
53	52	Mississippi Methodist Senior Services, Inc.	MS	1,450	776	354	320	1,460	786	354	320	-10
54	53	Lifespire of Virginia	VA	1,441	887	327	227	1,420	866	327	227	21
55	50	Baptist Village Communities	OK	1,415	933	257	225	1,521	939	257	325	-106
56	55	Lutheran Life Communities	IL	1,402	408	310	684	1,402	408	310	684	0
57	54	Presbyterian Homes	IL	1,399	821	237	341	1,402	824	237	341	-3
58	61	Presbyterian Villages of Michigan	MI	1,366	1,000	264	102	1,288	902	284	102	78
59	58	Masonicare	CT	1,326	651	309	366	1,326	651	309	366	0
60	51	Magnolia Manor, Inc.	GA	1,307	294	170	843	1,483	339	335	809	-176
61	60	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	1,306	876	316	114	0
62	62	Heritage Ministries	NY	1,268	363	221	684	1,268	363	221	684	0
63	63	National Lutheran Communities and Services	MD	1,255	697	247	311	1,255	697	247	311	0
64	66	Diakon	PA	1,236	625	197	414	1,219	615	192	412	17
65	64	Wesley Enhanced Living	PA	1,221	634	227	360	1,238	646	232	360	-17
66	65	American Baptist Homes of the Midwest	MN	1,220	359	272	589	1,220	359	272	589	0
67	68	Holland Home	MI	1,219	757	303	159	1,212	750	303	159	7
68	70	SpiriTrust Lutheran	PA	1,187	557	286	344	1,187	554	289	344	0
69	72	Phoebe Ministries	PA	1,179	370	275	534	1,163	370	259	534	16
70	73	Wesley	WA	1,163	765	214	184	1,160	762	214	184	3
71	71	Friendship Village	MO	1,157	785	138	234	1,184	814	136	234	-27
72	69	Brio Living Services fka UMRC and Porter Hills	MI	1,156	675	337	144	1,199	678	335	186	-43
73	79	Baruch Senior Ministries	MI	1,156	6	1,150	0	1,080	6	1,074	0	76
74	81	Legacy Lifecare	MA	1,141	0	361	780	1,064	0	367	697	77
75	74	United Methodist Homes	NY	1,129	436	267	426	1,134	437	271	426	-5

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2022 vs. 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2021 to 2022
				2022 Units				2021 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	56	Providence Life Services	IL	1,120	738	245	137	1,361	767	312	282	-241
77	76	Sequoia Living, Inc.	CA	1,116	844	136	136	1,116	844	136	136	0
78	77	Ingleside	MD	1,112	832	157	123	1,112	832	157	123	0
79	80	Eventide	MN	1,077	65	460	552	1,077	65	460	552	0
80	78	Friendship Senior Options	IL	1,075	679	184	212	1,111	685	184	242	-36
81	87	Walker Methodist	MN	1,069	328	481	260	1,009	328	421	260	60
82	90	Lutheran SeniorLife	PA	1,053	519	231	303	987	492	192	303	66
83	84	Brightspire fka The Presbyterian Homes	NC	1,023	701	133	189	1,028	706	133	189	-5
84	85	Lutheran Homes of South Carolina Inc.	SC	1,009	417	249	343	1,018	424	243	351	-9
85	107	Goodwin Living fka Goodwin House Incorporated	VA	996	704	119	173	850	580	121	149	146
86	88	Presbyterian Communities of South Carolina	SC	996	423	306	267	996	411	311	274	0
87	93	Liberty Lutheran Services	PA	978	443	318	217	978	443	318	217	0
88	92	UMRH, Inc.	NC	976	640	140	196	983	641	140	202	-7
89	89	Felician Services, Inc.	IL	974	172	257	545	990	177	268	545	-16
90	75	Pinnacle Living	VA	973	544	263	166	1,125	544	391	190	-152
91	100	Haverland Carter Lifestyle Group	NM	971	451	390	130	890	410	373	107	81
92	95	The RiverWoods Group	NH	967	681	242	44	955	681	175	99	12
93	96	EveryAge	NC	959	541	90	328	955	537	90	328	4
94	103	St. Andrew's Resources for Seniors System	MO	938	474	183	281	877	379	208	290	61
95	91	Blue Skies of Texas	TX	937	728	129	80	984	728	129	127	-47
96	119	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	803	39	339	425	119
97	97	Christian Living Communities	CO	919	421	306	192	924	420	312	192	-5
98	98	St. John's Home	NY	916	403	38	475	916	403	38	475	0
99	99	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	913	296	75	542	0
100	104	Givens Communities	NC	904	751	43	110	869	713	44	112	35

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2022 vs. 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2021 to 2022
				2022 Units				2021 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
101	113	Lutheran Social Ministries of MD	MD	893	700	60	133	822	637	70	115	71
102	105	Menno Haven, Inc.	PA	891	508	223	160	869	486	223	160	22
103	101	Masonic Homes of Ky, Inc.	KY	887	449	181	257	887	449	151	287	0
104	94	Saint Therese	MN	886	438	160	288	965	467	133	365	-79
105	102	United Methodist Communities	NJ	882	88	546	248	884	88	548	248	-2
106	117	Landis Communities	PA	868	610	155	103	808	545	160	103	60
107	106	Sun Health Services	AZ	866	637	114	115	867	637	115	115	-1
108	112	Alliance Health & Human Services	MA	861	0	0	861	824	0	0	824	37
109	108	Mather	IL	848	712	59	77	848	712	59	77	0
110	109	Garden Spot Communities	PA	845	621	105	119	845	621	105	119	0
111	114	The Moorings, Incorporated	FL	838	625	107	106	814	594	114	106	24
112	110	The New Jewish Home	NY	838	24	0	814	838	24	0	814	0
113	86	Christian Care Communities	KY	835	262	154	419	1,016	432	179	405	-181
114	111	Living Branches	PA	834	459	232	143	834	459	232	143	0
115	116	LutherCare	PA	823	484	128	211	810	473	126	211	13
116	115	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	814	330	149	335	0
117	125	Illuminus fka Marquardt Village, Inc.	WI	810	287	283	240	774	201	243	330	36
118	121	Wesley Willows	IL	801	547	163	91	800	546	163	91	1
119	118	Westminster-Canterbury on Chesapeake Bay	VA	799	611	80	108	806	618	80	108	-7
120	122	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	795	492	193	110	0
121	123	Sunnyside Communities	VA	773	484	155	134	789	500	157	132	-16
122	126	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	771	229	44	498	0
123	127	Grace Inspired Ministries	PA	767	451	151	165	767	451	151	165	0
124	128	United Church of Christ Homes	PA	766	267	124	375	766	267	124	375	0
125	129	Samaritas	MI	761	293	120	348	761	293	120	348	0

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2022 vs. 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2021 to 2022
				2022 Units				2021 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
126	158	Ebenezer Society	MN	753	0	443	310	567	0	320	247	186
127	82	Christian Health	NJ	746	353	95	298	1,049	617	134	298	-303
128	133	Benevolent Corporation Cedar Community	WI	737	437	225	75	737	422	225	90	0
129	NR	Futura Age fka eliseo and Foss Home	WA	733	221	114	398	733	221	114	398	0
130	124	Vista Prairie Communities	MN	729	100	629	0	789	100	689	0	-60
131	120	Simpson Senior Services	PA	726	454	170	102	802	454	170	178	-76
132	134	Bethany Lutheran Homes Inc.	WI	726	282	321	123	726	282	321	123	0
133	135	Emerald Communities	WA	725	527	107	91	725	527	107	91	0
134	136	Episcopal SeniorLife Communities	NY	709	334	193	182	709	334	193	182	0
135	137	Morningside Ministries	TX	708	434	134	140	708	434	134	140	0
136	139	United Methodist Memorial Home	IN	699	188	255	256	699	188	255	256	0
137	131	Brazos Presbyterian Homes Inc.	TX	697	503	91	103	747	425	121	201	-50
138	148	Sunset Senior Communities	MI	696	384	312	0	636	324	312	0	60
139	143	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	678	320	206	152	0
140	138	Ohio Masonic Home	OH	676	302	242	132	706	301	241	164	-30
141	144	Vincentian Collaborative Services	PA	675	66	82	527	675	66	82	527	0
142	NR	Ascentria Care Alliance	MA	673	0	57	616	673	0	57	616	0
143	132	Messiah Lifeways	PA	660	362	163	135	741	442	164	135	-81
144	NR	Well•Spring Group	NC	649	461	94	94	649	461	94	94	0
145	147	Community Wellness Partners, Inc.	NY	640	124	0	516	640	124	0	516	0
146	149	Smith Senior Living	IL	636	322	144	170	636	322	144	170	0
147	150	Wellspring Lutheran Services	MI	635	125	169	341	635	125	169	341	0
148	151	ThriveMore fka Baptist Retirement Homes of North Carolina, Inc.	NC	608	267	140	201	603	262	140	201	5
149	156	Friends Homes, Inc.	NC	603	394	100	109	568	359	100	109	35
150	152	Episcopal Communities & Services	CA	591	443	109	39	594	443	110	41	-3

NR: Not Ranked in that year

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2022 vs. 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2021 to 2022
				2022 Units				2021 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
151	153	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	587	238	229	120	0
152	NR	Retirement Companies of America	TN	580	396	94	90	580	396	94	90	0
153	154	Lutheran Life Villages	IN	577	183	69	325	577	183	69	325	0
154	146	Baptist Senior Services	PA	573	426	84	63	653	326	138	189	-80
155	157	Havenwood Heritage Heights	NH	567	367	63	137	567	367	63	137	0
156	159	Bethel	NY	563	170	130	263	563	170	130	263	0
157	160	The Legacy Senior Communities	TX	558	298	146	114	557	298	145	114	1
158	162	Friendly Senior Living	NY	555	298	57	200	555	298	57	200	0
159	163	Sholom Community Alliance	MN	552	153	142	257	552	153	142	257	0
160	NR	FellowshipLIFE fka Fellowship Senior Living	NJ	550	331	152	67	550	331	152	67	0
161	161	St. John's United	MT	546	204	167	175	557	204	167	186	-11
162	166	Church Homes, Inc.	CT	542	319	24	199	542	319	24	199	0
163	165	Bluestem Communities	KS	541	320	63	158	544	321	65	158	-3
164	168	Cardinal Ritter Senior Services	MO	541	205	90	246	541	205	90	246	0
165	170	Medford Leas	NJ	537	394	119	24	537	394	119	24	0
166	171	EHM Senior Solutions	MI	529	112	70	347	529	112	70	347	0
167	172	The Lutheran Home Association	WI	525	161	157	207	525	161	157	207	0
168	173	CRISTA Senior Living	WA	524	374	150	0	524	374	150	0	0
169	175	Redstone Presbyterian SeniorCare	PA	524	304	143	77	516	305	134	77	8
170	174	Rockwood Retirement Communities	WA	521	341	135	45	521	344	132	45	0
171	167	Christian Village Communities	OH	521	189	182	150	542	189	205	148	-21
172	192	Willow Brook Christian Communities	OH	520	267	169	84	437	230	123	84	83
173	176	LindenGrove Communities	WI	511	0	258	253	511	0	258	253	0
174	177	United Methodist Homes, Inc.	CT	507	90	297	120	507	90	297	120	0
175	180	Eliza Jennings Senior Care Network	OH	506	176	114	216	486	175	89	222	20

NR: Not Ranked in that year

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2022 vs. 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2021 to 2022
				2022 Units				2021 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
176	155	Episcopal Retirement Services	OH	500	277	85	138	576	267	115	194	-76
177	178	Judson Services, Inc.	OH	500	227	135	138	500	227	135	138	0
178	179	Knute Nelson	MN	494	211	200	83	494	211	200	83	0
179	NR	St. Edward Home	OH	493	177	235	81	493	177	235	81	0
180	181	St. Paul's Senior Services	CA	482	134	289	59	482	134	289	59	0
181	182	Bethany St. Joseph Corporation	WI	473	135	158	180	473	135	158	180	0
182	183	Deaconess Abundant Life Communities	MA	469	283	144	42	469	283	144	42	0
183	184	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	466	185	0	281	0
184	188	Good Shepherd Communities	NY	457	192	99	166	457	192	99	166	0
185	186	Beechwood Continuing Care, Inc.	NY	456	184	0	272	460	188	0	272	-4
186	185	The Lutheran Home Inc.	WI	455	170	98	187	461	170	104	187	-6
187	187	Loomis Communities Inc.	MA	454	357	55	42	459	359	58	42	-5
188	190	Michigan Masonic Homes	MI	442	38	155	249	442	38	155	249	0
189	183	Allegheny Lutheran Social Ministries	PA	431	183	96	152	431	183	96	152	0
190	164	Bethesda	MN	430	89	93	248	549	146	123	280	-119
191	194	Baptist Life Communities	KY	428	150	60	218	428	150	60	218	0
192	197	Community First Solutions	OH	426	197	101	128	413	184	101	128	13
193	189	Genacross Lutheran Services	OH	426	107	119	200	457	137	135	185	-31
194	NR	Convivial Life Inc.	FL	424	243	181	0	424	243	181	0	0
195	195	Skaalen Retirement Services	WI	421	229	101	91	421	229	101	91	0
196	196	Wesbury	PA	418	117	91	210	418	117	91	210	0
197	198	A.G. Rhodes	GA	413	0	0	413	413	0	0	413	0
198	199	Parker	NJ	407	0	60	347	407	0	60	347	0
199	200	South Carolina Baptist Ministry of Aging (SCBMA)	SC	398	139	83	176	402	94	134	174	0
200	Over	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	395	290	105	0	0
		<b>TOTAL UNITS</b>		<b>306,770</b>	<b>154,178</b>	<b>66,846</b>	<b>85,746</b>	<b>305,554</b>	<b>152,280</b>	<b>64,974</b>	<b>88,300</b>	<b>1,221</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	% as total of LZ 200 units
10	52,265	14,982	23,487	<b>90,734</b>	<b>30%</b>
25	77,329	25,828	35,943	<b>139,100</b>	<b>45%</b>
50	97,576	39,395	50,142	<b>187,113</b>	<b>61%</b>
100	125,537	52,519	66,140	<b>244,196</b>	<b>80%</b>
150	143,548	60,800	77,708	<b>282,056</b>	<b>92%</b>
200	154,178	66,846	85,746	<b>306,770</b>	<b>100%</b>

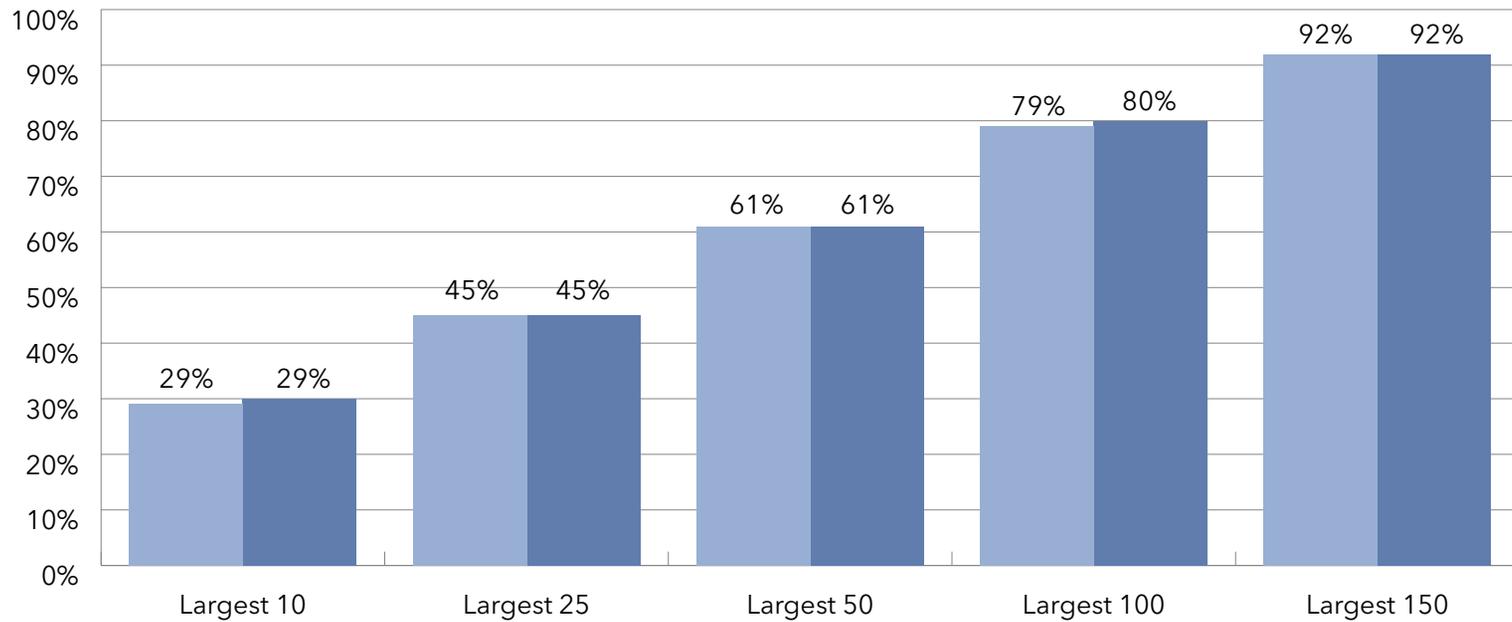
#### Analysis of Unit Mix for Each Year's Respective LZ 200 Listing

<b>2019 LZ 200</b>				
2018 avg units/system	734.8	311.8	462.8	1509.4
Percent of total	48.4%	20.2%	31.4%	100%
<b>2020 LZ 200</b>				
2019 avg units/system	750.4	319.6	453.1	1513.5
Percent of total	49.6%	21.1%	29.9%	100%
<b>2021 LZ 200</b>				
2020 avg units/system	738.7	322.9	448.9	1510.5
Percent of total	48.9%	21.4%	29.7%	100%
<b>2022 LZ 200</b>				
2021 avg units/system	763.6	328.9	441.2	1533.7
Percent of total	49.8%	21.4%	28.8%	100%
<b>2021 LZ 200</b>				
2022 avg units/system	770.9	334.2	428.7	1533.9
Percent of total	50.3%	21.8%	28.0%	100%

Largest	2022 Total Units	2021 Total Units	Change in total units	Percent change in total units
10	<b>90,734</b>	<b>88,931</b>	1,803	2.0%
25	<b>139,100</b>	<b>139,446</b>	-346	-0.2%
50	<b>187,113</b>	<b>186,215</b>	898	0.5%
100	<b>244,196</b>	<b>243,249</b>	947	0.4%
150	<b>282,056</b>	<b>281,567</b>	489	0.2%
200	<b>306,770</b>	<b>306,736</b>	34	0.0%

## Organizational Characteristics: Locations

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

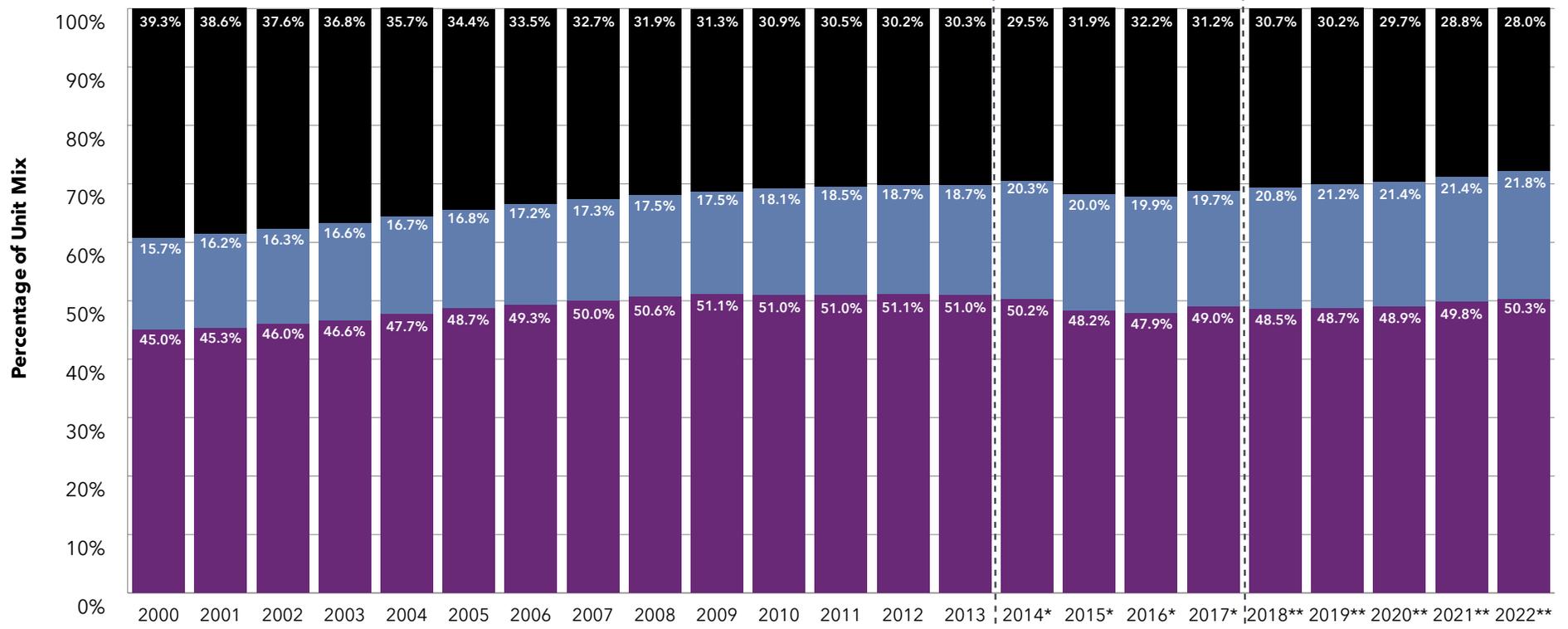


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# Organizational Characteristics: Locations

Total Mix by Year, by Percent, 2000 Through 2022 for 2023 LZ 200



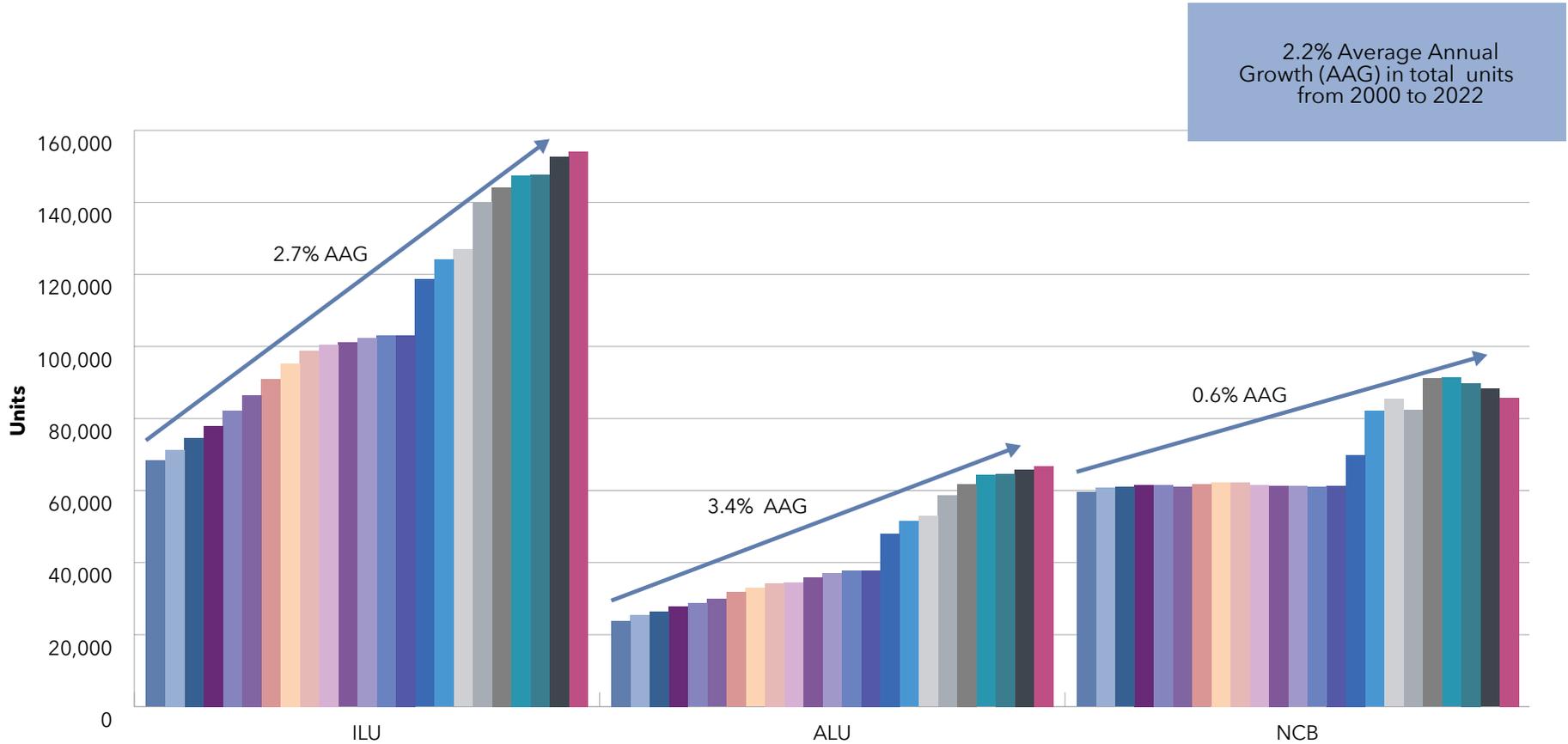
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\*Note change from 100 to 150 with the 2014 publication

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

# Organizational Characteristics: Locations

## Unit Type Comparison, 2000 Through 2022 for 2023 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 (2022 vs 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2021 to 2022
				2022 Communities					2021 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
1	1	National Senior Communities	VA	16	16	0	0	0	16	16	0	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	124	52	7	19	46	141	53	8	9	71	-17
3	4	Presbyterian Homes & Services	MN	54	16	37	0	1	55	16	36	0	3	-1
4	3	Acts Retirement-Life Communities	PA	26	26	0	0	0	26	26	0	0	0	0
5	5	Ascension Living	MO	35	9	5	2	19	35	9	5	2	19	0
6	8	Lifespace Communities, Inc.	IA	17	17	0	0	0	14	14	0	0	0	3
7	6	HumanGood	CA	22	21	1	0	0	22	21	1	0	0	0
8	7	Covenant Living Communities & Services	IL	19	15	2	1	1	18	14	2	1	1	1
9	9	Trinity Health Senior Communities	MI	33	6	10	2	15	33	6	10	2	15	0
10	10	Benedictine	MN	34	10	3	4	17	33	10	3	3	17	1
11	11	Westminster Retirement Communities of Florida	FL	10	10	0	0	0	10	10	0	0	0	0
12	13	Front Porch Communities and Services	CA	19	10	9	0	0	19	10	9	0	0	0
13	16	Cassia	MN	47	0	2	28	17	47	0	0	30	17	0
14	15	Asbury Communities, Inc.	MD	9	9	0	0	0	9	9	0	0	0	0
15	14	Lutheran Senior Services	MO	9	8	0	1	0	11	9	0	1	1	-2
16	17	The Kendal Corporation	DE	10	8	1	0	1	11	9	1	0	1	-1
17	18	Pacific Retirement Services	OR	10	10	0	0	0	10	10	0	0	0	0
18	20	Otterbein SeniorLife	OH	18	9	0	0	9	18	9	0	0	9	0
19	19	Presbyterian Senior Living	PA	15	11	3	1	0	16	11	3	2	0	-1
20	21	Concordia Lutheran Ministries	PA	15	6	0	7	2	15	6	0	7	2	0
21	23	The Carmelite System, Inc.	NY	15	1	0	3	11	15	1	0	3	11	0
22	40	BHI Senior Living, Inc.	IN	9	9	0	0	0	5	5	0	0	0	4
23	22	Ohio Living	OH	12	9	1	0	2	12	9	1	0	2	0
24	26	Springpoint Senior Living	NJ	10	8	0	1	1	9	8	0	0	1	1
25	12	Retirement Housing Foundation	CA	10	5	5	0	0	18	9	8	1	0	-8

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2022 vs 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2021 to 2022
				2022 Communities					2021 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
26	24	Masonic Villages of the Grand Lodge of PA	PA	5	3	1	0	1	5	3	1	0	1	0
27	25	Transforming Age	WA	18	3	11	4	0	18	3	7	8	0	0
28	27	Volunteers of America	VA	23	4	2	9	8	23	4	2	9	8	0
29	32	Willow Valley Communities	PA	3	3	0	0	0	3	3	0	0	0	0
30	39	Bethesda Senior Living Communities	CO	21	0	5	16	0	18	0		16	0	3
31	29	Christian Care Companies	AZ	6	0	5	0	1	6	0	5	0	1	0
32	30	Presbyterian Manors of Mid-America	KS	15	14	0	1	0	15	14	0	1	0	0
33	31	Ecumen	MN	31	0	7	20	4	30	0	5	20	5	1
34	33	National Church Residences	OH	13	3	1	9	0	13	3	1	9	0	0
35	34	WesleyLife	IA	11	10	0	0	1	11	9	0	0	2	0
36	35	Homewood Retirement Centers, Inc.	MD	5	4	1	0	0	5	4	1	0	0	0
37	36	Greencroft Communities	IN	9	7	0	2	0	9	7	0	2	0	0
38	41	Franciscan Communities, Inc.	IL	8	4	1	3	0	9	5	1	3	0	-1
39	37	ArchCare	NY	6	0	0	1	5	6	0	0	1	5	0
40	57	Lutheran Services Carolinas	NC	10	3	1	0	6	8	2	1	0	5	2
41	45	Bethesda Health Group, Inc.	MO	13	0	7	2	4	12	0	6	2	4	1
42	42	Covenant Health	MA	14	0	0	4	10	14	0	0	4	10	0
43	43	Buckner Retirement Services	TX	6	6	0	0	0	6	6	0	0	0	0
44	83	Life Enriching Communities	OH	6	6	0	0	0	3	3	0	0	0	3
45	44	Loretto	NY	9	1	2	4	2	9	1	2	4	2	0
46	28	Christian Horizons	MO	12	8	2	2	0	12	8	2	2	0	0
47	38	United Church Homes, Inc.	OH	13	4	5	0	4	14	5	5	0	4	-1
48	46	Presbyterian SeniorCare Network	PA	7	7	0	0	0	7	7	0	0	0	0
49	47	Immanuel	NE	19	8	2	7	2	19	8	2	7	2	0
50	48	Eskaton	CA	12	1	1	7	3	12	1	1	7	3	0

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2022 vs 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2021 to 2022
				2022 Communities					2021 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
51	59	Methodist Retirement Communities	TX	8	5	2	1	0	7	5	1	1	0	1
52	49	Hebrew SeniorLife	MA	4	2	1	0	1	4	2	1	0	1	0
53	52	Mississippi Methodist Senior Services, Inc.	MS	12	2	8	0	2	12	2	8	0	2	0
54	53	Lifespire of Virginia	VA	5	5	0	0	0	5	5	0	0	0	0
55	50	Baptist Village Communities	OK	11	2	8	1	0	12	3	8	1	0	-1
56	55	Lutheran Life Communities	IL	4	3	0	0	1	5	4	0	0	1	-1
57	54	Presbyterian Homes	IL	4	3	1	0	0	4	3	1	0	0	0
58	61	Presbyterian Villages of Michigan	MI	10	1	7	2	0	10	1	7	2	0	0
59	58	Masonicare	CT	7	2	2	2	1	7	2	2	2	1	0
60	51	Magnolia Manor, Inc.	GA	8	2	4	1	1	8	2	4	1	1	0
61	60	SantaFe Senior Living, Inc.	FL	3	2	1	0	0	3	2	1	0	0	0
62	62	Heritage Ministries	NY	8	4	2	1	1	8	4	2	1	1	0
63	63	National Lutheran Communities and Services	MD	4	3	0	1	0	4	3	0	1	0	0
64	66	Diakon	PA	4	4	0	0	0	4	4	0	0	0	0
65	64	Wesley Enhanced Living	PA	6	5	0	1	0	6	6	0	0	0	0
66	65	American Baptist Homes of the Midwest	MN	7	5	0	0	2	7	5	0	0	2	0
67	68	Holland Home	MI	2	2	0	0	0	2	2	0	0	0	0
68	70	SpiriTrust Lutheran	PA	6	6	0	0	0	6	6	0	0	0	0
69	72	Phoebe Ministries	PA	4	4	0	0	0	4	4	0	0	0	0
70	73	Wesley	WA	4	0	4	0	0	4	2	2	0	0	0
71	71	Friendship Village	MO	2	2	0	0	0	2	2	0	0	0	0
72	69	Brio Living Services fka UMRC and Porter Hills	MI	6	2	2	1	1	6	3	2	1	0	0
73	79	Baruch Senior Ministries	MI	29	0	0	29	0	27	0	0	27	0	2
74	81	Legacy Lifecare	MA	7	0	0	1	6	5	0	0	0	5	2
75	74	United Methodist Homes	NY	4	3	0	1	0	4	3	0	1	0	0

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2022 vs 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2021 to 2022
				2022 Communities					2021 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
76	56	Providence Life Services	IL	6	1	4	1	0	7	1	4	1	1	-1
77	76	Sequoia Living, Inc.	CA	4	4	0	0	0	4	4	0	0	0	0
78	77	Ingleside	MD	3	3	0	0	0	3	3	0	0	0	0
79	80	Eventide	MN	6	5	0	1	0	5	5	0	0	0	1
80	78	Friendship Senior Options	IL	2	2	0	0	0	2	2	0	0	0	0
81	87	Walker Methodist	MN	8	1	4	2	1	7	1	4	1	1	1
82	90	Lutheran SeniorLife	PA	11	2	8	0	1	11	2	8	0	1	0
83	84	Brightspire fka The Presbyterian Homes	NC	3	3	0	0	0	3	3	0	0	0	0
84	85	Lutheran Homes of South Carolina Inc.	SC	5	5	0	0	0	5	5	0	0	0	0
85	107	Goodwin Living fka Goodwin House Incorporated	VA	3	3	0	0	0	2	2	0	0	0	1
86	88	Presbyterian Communities of South Carolina	SC	6	6	0	0	0	6	6	0	0	0	0
87	93	Liberty Lutheran Services	PA	5	3	1	1	0	5	3	1	0	1	0
88	92	UMRH, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
89	89	Felician Services, Inc.	IL	8	2	2	1	3	8	2	2	1	3	0
90	75	Pinnacle Living	VA	4	4	0	0	0	5	5	0	0	0	-1
91	100	Haverland Carter Lifestyle Group	NM	4	2	0	2	0	4	2	0	2	0	0
92	95	The RiverWoods Group	NH	3	3	0	0	0	3	3	0	0	0	0
93	96	EveryAge	NC	3	3	0	0	0	3	3	0	0	0	0
94	103	St. Andrew's Resources for Seniors System	MO	6	2	2	1	1	6	1	2	1	2	0
95	91	Blue Skies of Texas	TX	2	2	0	0	0	2	2	0	0	0	0
96	119	Methodist Homes of Alabama & Northwest Florida	AL	6	2	0	3	1	5	1	0	3	1	1
97	97	Christian Living Communities	CO	6	3	0	3	0	6	3	0	3	0	0
98	98	St. John's Home	NY	4	0	1	1	2	4	0	1	1	2	0
99	99	St. Ann's of Greater Rochester, Inc.	NY	3	2	1	0	0	3	2	1	0	0	0
100	104	Givens Communities	NC	2	2	0	0	0	2	2	0	0	0	0

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2022 vs 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2021 to 2022
				2022 Communities					2021 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
101	113	Lutheran Social Ministries of MD	MD	2	2	0	0	0	2	2	0	0	0	0
102	105	Menno Haven, Inc.	PA	2	2	0	0	0	2	2	0	0	0	0
103	101	Masonic Homes of Ky, Inc.	KY	3	2	1	0	0	3	2	1	0	0	0
104	94	Saint Therese	MN	5	3	1	1	0	5	3	0	1	1	0
105	102	United Methodist Communities	NJ	4	1	0	3	0	4	1	0	3	0	0
106	117	Landis Communities	PA	4	1	2	1	0	3	1	1	1	0	1
107	106	Sun Health Services	AZ	3	3	0	0	0	3	3	0	0	0	0
108	112	Alliance Health & Human Services	MA	7	0	0	0	7	8	0	0	0	8	-1
109	108	Mather	IL	3	2	1	0	0	3	2	1	0	0	0
110	109	Garden Spot Communities	PA	2	1	0	0	1	2	1	0	0	1	0
111	114	The Moorings, Incorporated	FL	3	1	2	0	0	3	1	2	0	0	0
112	110	The New Jewish Home	NY	3	0	1	0	2	3	0	1	0	2	0
113	86	Christian Care Communities	KY	10	5	3	2	0	8	3	2	1	2	2
114	111	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
115	116	LutherCare	PA	3	2	0	0	1	3	0	2	0	1	0
116	115	Presbyterian Homes of Georgia, Inc.	GA	3	3	0	0	0	3	3	0	0	0	0
117	125	Illuminus fka Marquardt Village, Inc.	WI	5	2	1	1	1	4	2	0	0	2	1
118	121	Wesley Willows	IL	2	1	1	0	0	2	1	1	0	0	0
119	118	Westminster-Canterbury on Chesapeake Bay	VA	2	1	1	0	0	2	1	1	0	0	0
120	122	Oakwood Lutheran Senior Ministries	WI	2	2	0	0	0	2	2	0	0	0	0
121	123	Sunnyside Communities	VA	3	3	0	0	0	3	3	0	0	0	0
122	126	Amsterdam Continuing Care Health System, Inc.	NY	2	1	0	0	1	2	1	0	0	1	0
123	127	Grace Inspired Ministries	PA	2	2	0	0	0	2	2	0	0	0	0
124	128	United Church of Christ Homes	PA	6	0	2	0	4	6	4	2	0	0	0
125	129	Samaritas	MI	5	1	2	0	2	5	1	2	0	2	0

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2022 vs 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2021 to 2022
				2022 Communities					2021 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
126	158	Ebenezer Society	MN	8	0	0	6	2	8	0	0	5	3	0
127	82	Christian Health	NJ	7	1	4	1	1	7	0	5	1	1	0
128	133	Benevolent Corporation Cedar Community	WI	7	1	3	2	1	6	1	3	2	0	1
129	NR	Futura Age fka eliseo and Foss Home	WA	2	1	0	0	1	2	1	0	0	1	0
130	124	Vista Prairie Communities	MN	8	0	1	7	0	9	0	0	9	0	-1
131	120	Simpson Senior Services	PA	3	3	0	0	0	3	3	0	0	0	0
132	134	Bethany Lutheran Homes Inc.	WI	10	2	1	6	1	10	2	1	6	1	0
133	135	Emerald Communities	WA	2	2	0	0	0	2	2	0	0	0	0
134	136	Episcopal SeniorLife Communities	NY	9	0	5	3	1	9	0	5	3	1	0
135	137	Morningside Ministries	TX	3	2	1	0	0	3	2	1	0	0	0
136	139	United Methodist Memorial Home	IN	3	3	0	0	0	3	3	0	0	0	0
137	131	Brazos Presbyterian Homes Inc.	TX	3	3	0	0	0	3	3	0	0	0	0
138	148	Sunset Senior Communities	MI	4	0	2	2	0	4	0	2	2	0	0
139	143	United Lutheran Program for the Aging, Inc.	WI	5	0	1	3	1	5	0	1	3	1	0
140	138	Ohio Masonic Home	OH	3	2	0	1	0	3	2	1	0	0	0
141	144	Vincentian Collaborative Services	PA	4	2	0	0	2	4	2	0	0	2	0
142	NR	Ascentria Care Alliance	MA	5	0	0	0	5	5	0	0	0	5	0
143	132	Messiah Lifeways	PA	2	1	1	0	0	2	1	1	0	0	0
144	NR	Well•Spring Group	NC	2	2	0	0	0	2	2	0	0	0	0
145	147	Community Wellness Partners, Inc.	NY	4	0	1	1	2	4	0	1	1	2	0
146	149	Smith Senior Living	IL	2	2	0	0	0	2	2	0	0	0	0
147	150	Wellspring Lutheran Services	MI	9	1	2	2	4	9	1	2	2	4	0
148	151	ThriveMore fka Baptist Retirement Homes of North Carolina, Inc.	NC	4	2	0	1	1	4	2	0	1	1	0
149	156	Friends Homes, Inc.	NC	2	2	0	0	0	2	2	0	0	0	0
150	152	Episcopal Communities & Services	CA	4	3	0	1	0	4	3	0	1	0	0

NR: Not Ranked in that year

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2022 vs 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2021 to 2022
				2022 Communities					2021 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
151	153	Shepherd of the Valley Lutheran Retirement Services	OH	4	2	1	0	1	4	2	1	0	1	0
152	NR	Retirement Companies of America	TN	2	2	0	0	0	2	2	0	0	0	0
153	154	Lutheran Life Villages	IN	4	2	0	0	2	4	2	0	0	2	0
154	146	Baptist Senior Services	PA	2	1	1	0	0	2	1	0	0	1	0
155	157	Havenwood Heritage Heights	NH	2	2	0	0	0	2	2	0	0	0	0
156	159	Bethel	NY	5	1	1	1	2	5	1	1	1	2	0
157	160	The Legacy Senior Communities	TX	2	2	0	0	0	2	2	0	0	0	0
158	162	Friendly Senior Living	NY	4	0	2	1	1	4	0	2	1	1	0
159	163	Sholom Community Alliance	MN	5	0	1	2	2	5	0	1	2	2	0
160	NR	FellowshipLIFE fka Fellowship Senior Living	NJ	2	2	0	0	0	2	2	0	0	0	0
161	161	St. John's United	MT	5	4	0	1	0	5	4	0	1	0	0
162	166	Church Homes, Inc.	CT	2	2	0	0	0	2	2	0	0	0	0
163	165	Bluestem Communities	KS	2	2	0	0	0	2	2	0	0	0	0
164	168	Cardinal Ritter Senior Services	MO	4	1	1	1	1	4	1	1	1	1	0
165	170	Medford Leas	NJ	2	1	1	0	0	2	1	1	0	0	0
166	171	EHM Senior Solutions	MI	8	1	3	2	2	8	1	3	2	2	0
167	172	The Lutheran Home Association	WI	6	2	1	2	1	6	2	1	2	1	0
168	173	CRISTA Senior Living	WA	2	0	1	1	0	2	0	1	1	0	0
169	175	Redstone Presbyterian SeniorCare	PA	3	1	2	0	0	3	1	2	0	0	0
170	174	Rockwood Retirement Communities	WA	2	2	0	0	0	2	2	0	0	0	0
171	167	Christian Village Communities	OH	2	2	0	0	0	2	2	0	0	0	0
172	192	Willow Brook Christian Communities	OH	3	2	0	0	1	3	2	0	1	0	0
173	176	LindenGrove Communities	WI	4	4	0	0	0	4	4	0	0	0	0
174	177	United Methodist Homes, Inc.	CT	3	1	0	2	0	3	1	0	2	0	0
175	180	Eliza Jennings Senior Care Network	OH	3	1	0	1	1	3	1	0	1	1	0

NR: Not Ranked in that year

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2022 vs 2021)

2023 Rank	2022 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2021 to 2022
				2022 Communities					2021 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
176	155	Episcopal Retirement Services	OH	3	3	0	0	0	3	3	0	0	0	0
177	178	Judson Services, Inc.	OH	2	1	1	0	0	2	1	1	0	0	0
178	179	Knute Nelson	MN	5	0	2	2	1	7	0	2	4	1	-2
179	NR	St. Edward Home	OH	3	0	0	3	0	3	0	0	3	0	0
180	181	St. Paul's Senior Services	CA	4	0	1	2	1	4	0	1	2	1	0
181	182	Bethany St. Joseph Corporation	WI	12	0	5	5	2	12	0	5	5	2	0
182	183	Deaconess Abundant Life Communities	MA	3	1	1	1	0	3	1	1	1	0	0
183	184	Presbyterian Homes and Services of Kentucky	KY	4	0	0	2	2	4	0	0	2	2	0
184	188	Good Shepherd Communities	NY	3	1	0	0	2	3	1	0	0	2	0
185	186	Beechwood Continuing Care, Inc.	NY	3	0	2	0	1	3	0	1	0	2	0
186	185	The Lutheran Home Inc.	WI	2	0	1	0	1	4	0	1	2	1	-2
187	187	Loomis Communities Inc.	MA	3	3	0	0	0	3	3	0	0	0	0
188	190	Michigan Masonic Homes	MI	2	1	0	0	1	2	1	0	0	1	0
189	183	Allegheny Lutheran Social Ministries	PA	3	3	0	0	0	3	3	0	0	0	0
190	164	Bethesda	MN	3	1	1	1	0	3	0	1	1	1	0
191	194	Baptist Life Communities	KY	6	1	2	1	2	6	1	2	1	2	0
192	197	Community First Solutions	OH	3	2	0	0	1	3	2	0	0	1	0
193	189	Genacross Lutheran Services	OH	2	2	0	0	0	2	1	1	0	0	0
194	NR	Convivial Life Inc.	FL	2	1	0	1	0	2	1	0	1	0	0
195	195	Skaalen Retirement Services	WI	8	0	4	3	1	8	0	4	3	1	0
196	196	Wesbury	PA	2	1	1	0	0	2	1	1	0	0	0
197	198	A.G. Rhodes	GA	3	0	0	0	3	3	0	0	0	3	0
198	199	Parker	NJ	6	0	0	1	5	5	0	0	1	4	1
199	200	South Carolina Baptist Ministry of Aging (SCBMA)	SC	2	2	0	0	0	2	2	0	0	0	0
200	>200	Jewish Senior Life of Metropolitan Detroit	MI	4	0	2	2	0	3	0	2	1	0	1
		<b>TOTAL COMMUNITIES</b>		<b>1,558</b>	<b>678</b>	<b>283</b>	<b>301</b>	<b>296</b>	<b>1,564</b>	<b>675</b>	<b>269</b>	<b>292</b>	<b>328</b>	<b>-6</b>

NR: Not Ranked in that year

## Organizational Characteristics: Communities

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

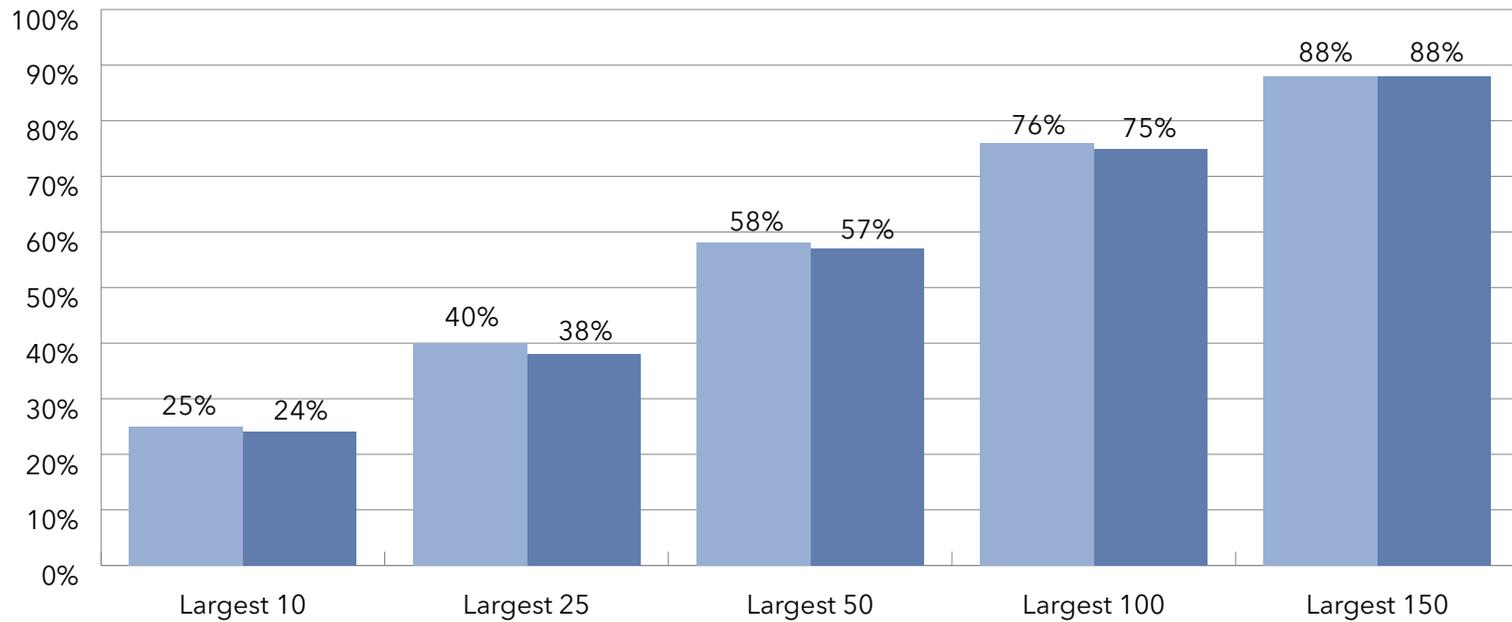
Largest	LPC	IL	AL	NH	ALL	Percent as total of LZ 200
10	188	65	28	99	<b>380</b>	<b>24%</b>
25	301	86	69	142	<b>598</b>	<b>38%</b>
50	400	140	160	193	<b>893</b>	<b>57%</b>
100	537	205	218	218	<b>1,178</b>	<b>76%</b>
150	615	245	263	259	<b>1,382</b>	<b>89%</b>
200	678	283	301	296	<b>1,558</b>	<b>100%</b>

Analysis of Community Mix for Each Year's Respective LZ 200 Listing					
	LPC	IL	AL	NH	ALL
<b>2019 LZ 200</b>					
2018 avg communities/system	3.5	1.3	1.4	1.6	7.8
Percent of total	44.5%	17.3%	17.8%	20.4%	100.0%
<b>2020 LZ 200</b>					
2019 avg communities/system	3.5	1.3	1.5	1.6	7.9
Percent of total	43.7%	16.9%	18.8%	20.7%	100.0%
<b>2021 LZ 200</b>					
2020 avg communities/system	3.3	1.4	1.6	1.7	8.0
Percent of total	41.6%	17.3%	19.5%	21.7%	100.0%
<b>2022 LZ 200</b>					
2021 avg communities/system	3.4	1.4	1.5	1.6	7.9
Percent of total	43.1%	17.4%	18.8%	20.7%	100.0%
<b>2023 LZ 200</b>					
2022 avg communities/system	3.4	1.4	1.5	1.5	7.8
Percent of total	43.5%	18.2%	19.3%	19.0%	100.0%

Largest	2022 Total Communities	2021 Total Communities	Change in total communities	Percent change in total communities
10	<b>380</b>	<b>393</b>	-13	-3.4%
25	<b>598</b>	<b>627</b>	-29	-4.8%
50	<b>893</b>	<b>910</b>	-17	-1.9%
100	<b>1,178</b>	<b>1,195</b>	-17	-1.4%
150	<b>1,382</b>	<b>1,386</b>	-4	-0.3%
200	<b>1,558</b>	<b>1,570</b>	-12	-0.8%

## Organizational Characteristics: Communities

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

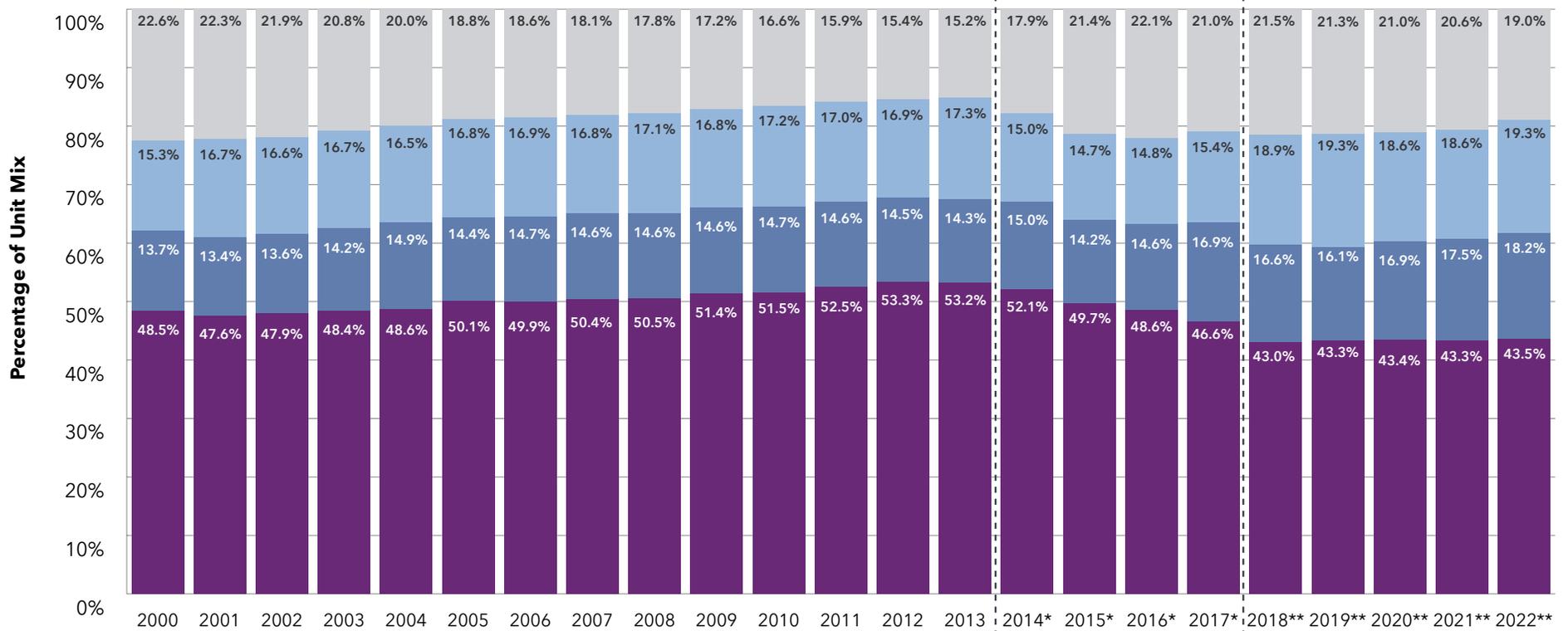


KEY:



# Organizational Characteristics: Communities

Total Mix by Year, by Percent, 2000 Through 2022 for 2023 LZ 200



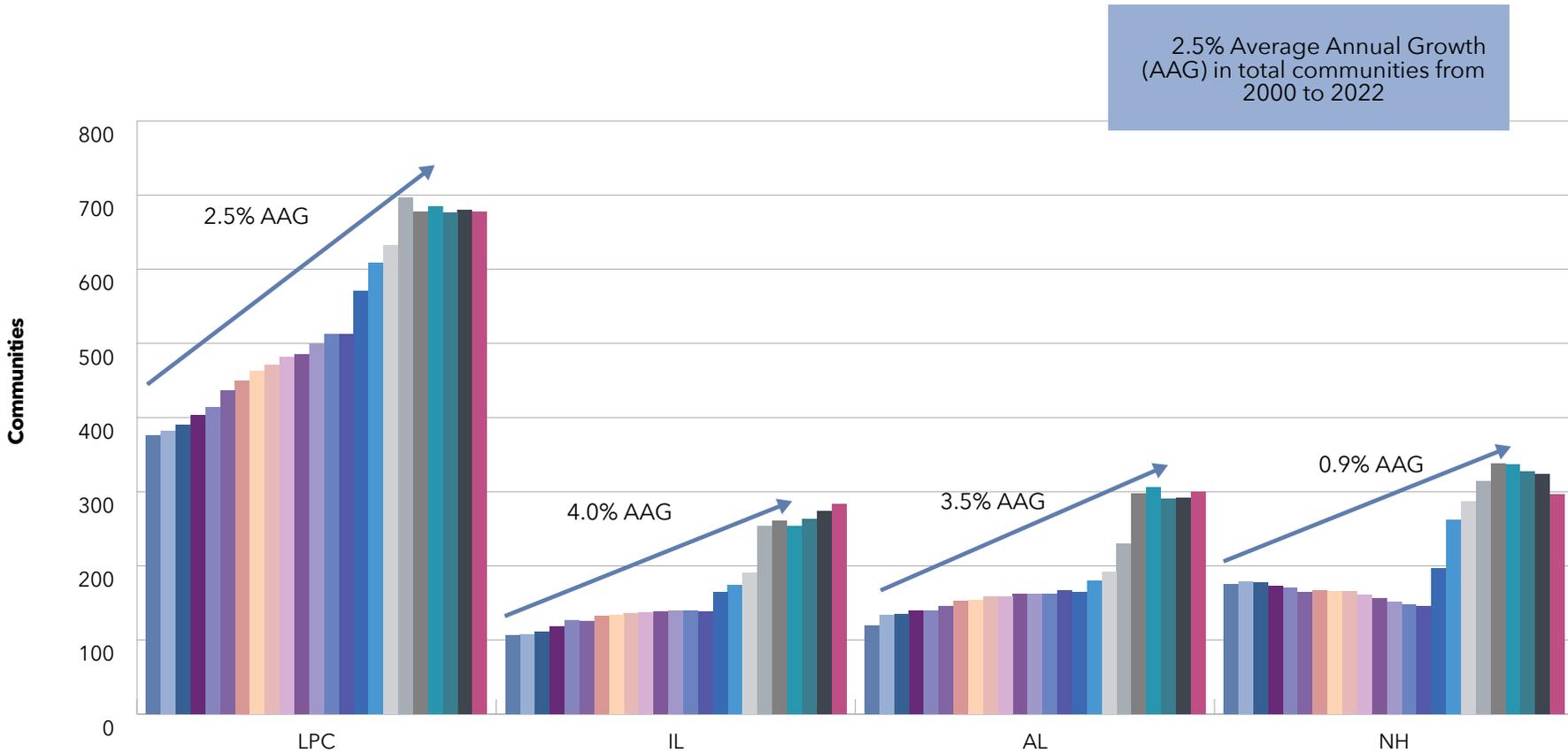
KEY: ■ LPC ■ IL ■ AL ■ NH

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

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

# Organizational Characteristics: Communities

## Community Type Comparison, by Community, 2000 Through 2022 for 2023 LZ 200



KEY:



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

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

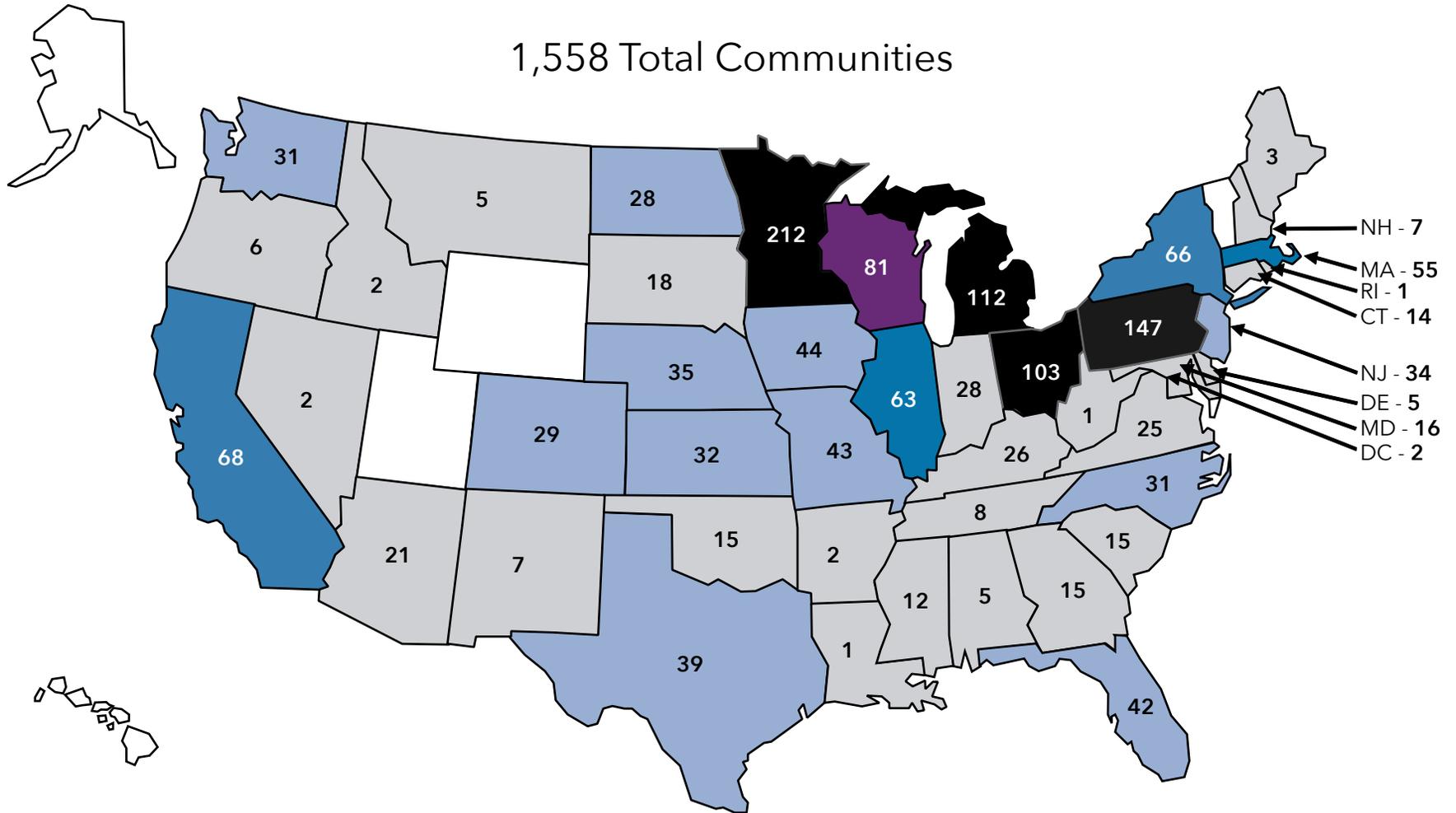
## Organizational Characteristics: Locations

### *Top Five States by Community Type*

LPC			ILF			ALF			NH		
<b>1</b>	PA	102	<b>1</b>	MN	59	<b>1</b>	MN	74	<b>1</b>	MN	47
<b>2</b>	SD	52	<b>2</b>	MI	30	<b>2</b>	MI	42	<b>2</b>	SD	46
<b>3</b>	OH	48	<b>3</b>	PA	22	<b>3</b>	WI	22	<b>3</b>	NY	33
<b>4</b>	CA	44	<b>4</b>	NY	18	<b>4</b>	CO	19	<b>4</b>	MA	29
<b>5</b>	MN	41	<b>5</b>	CA	17	<b>5</b>	SD	19	<b>5</b>	MI	25

# Organizational Characteristics: Locations

## Community Locations

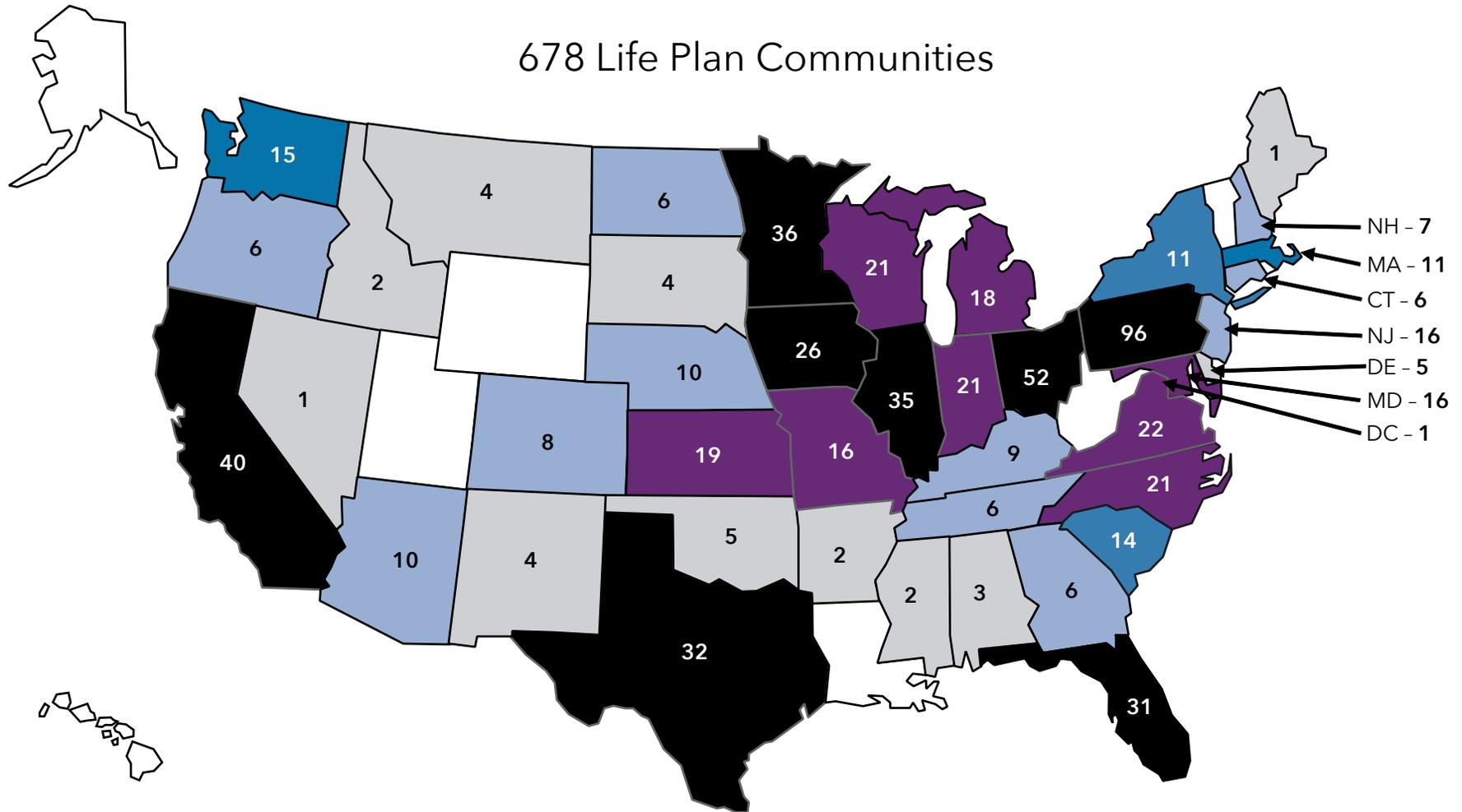


KEY:



# Organizational Characteristics: Locations

## Life Plan Community (LPC) Locations

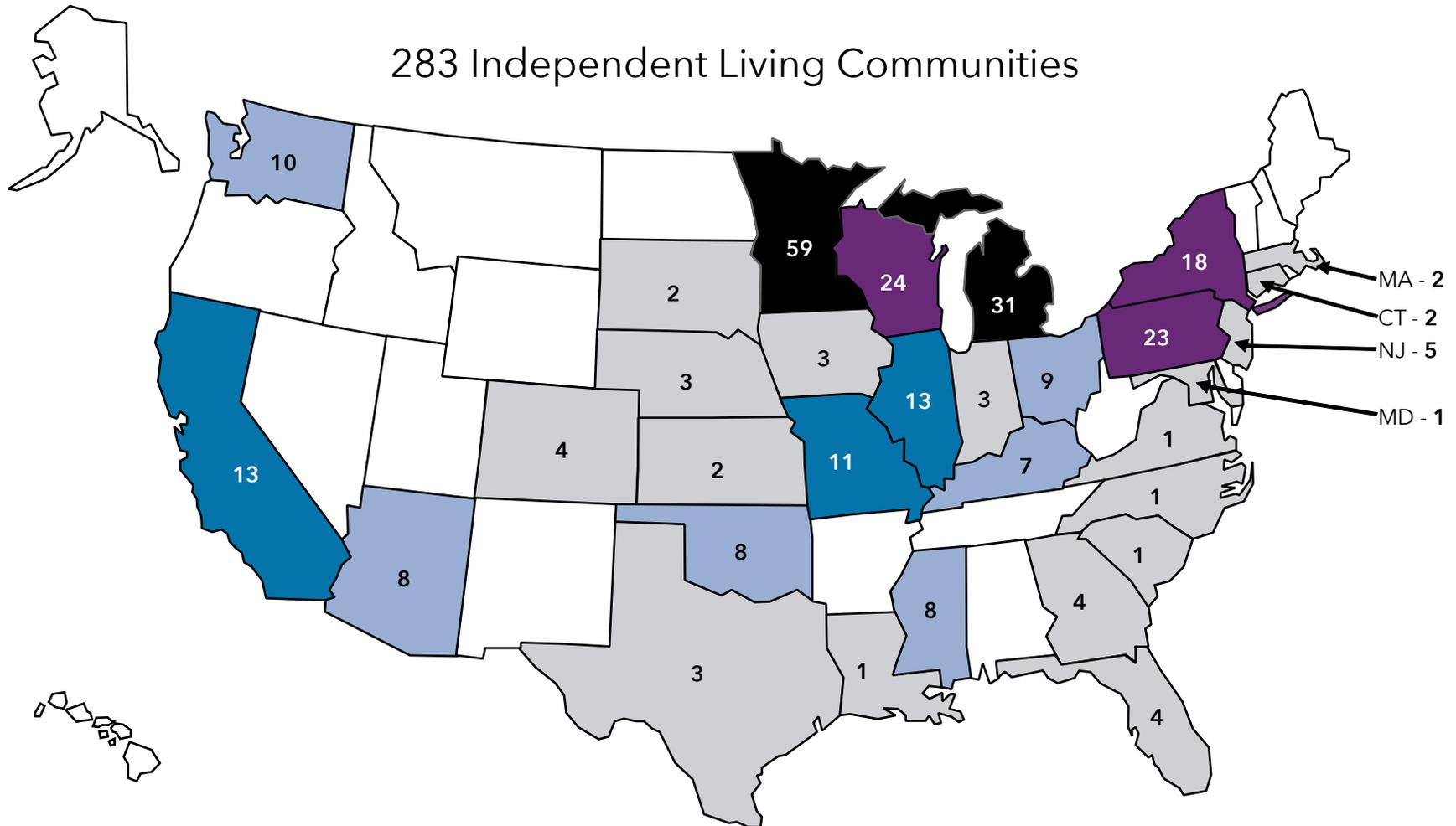


KEY:



# Organizational Characteristics: Locations

## Independent Living (IL) Community Locations

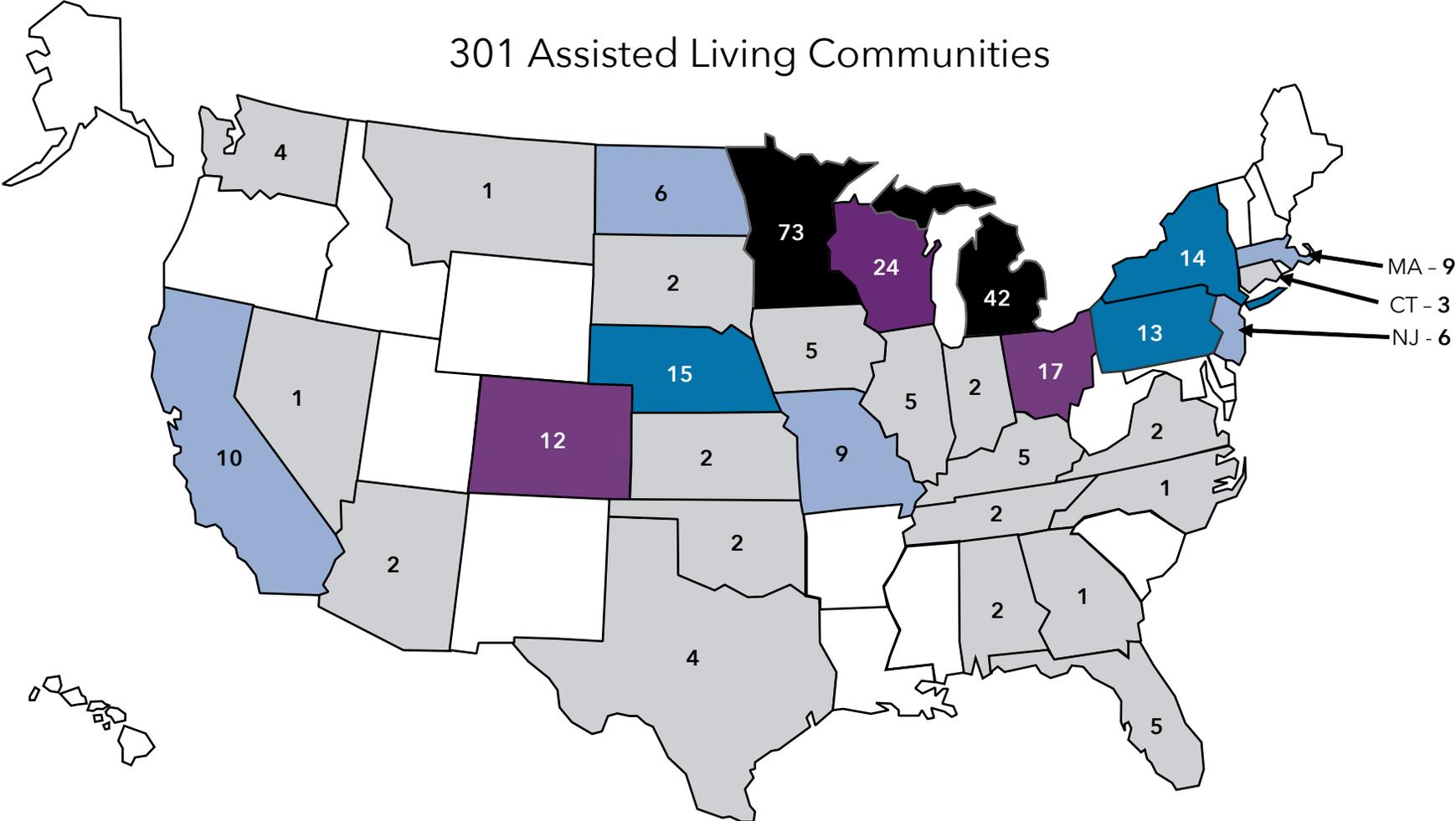


KEY:



# Organizational Characteristics: Locations

## Assisted Living (AL) Community Locations

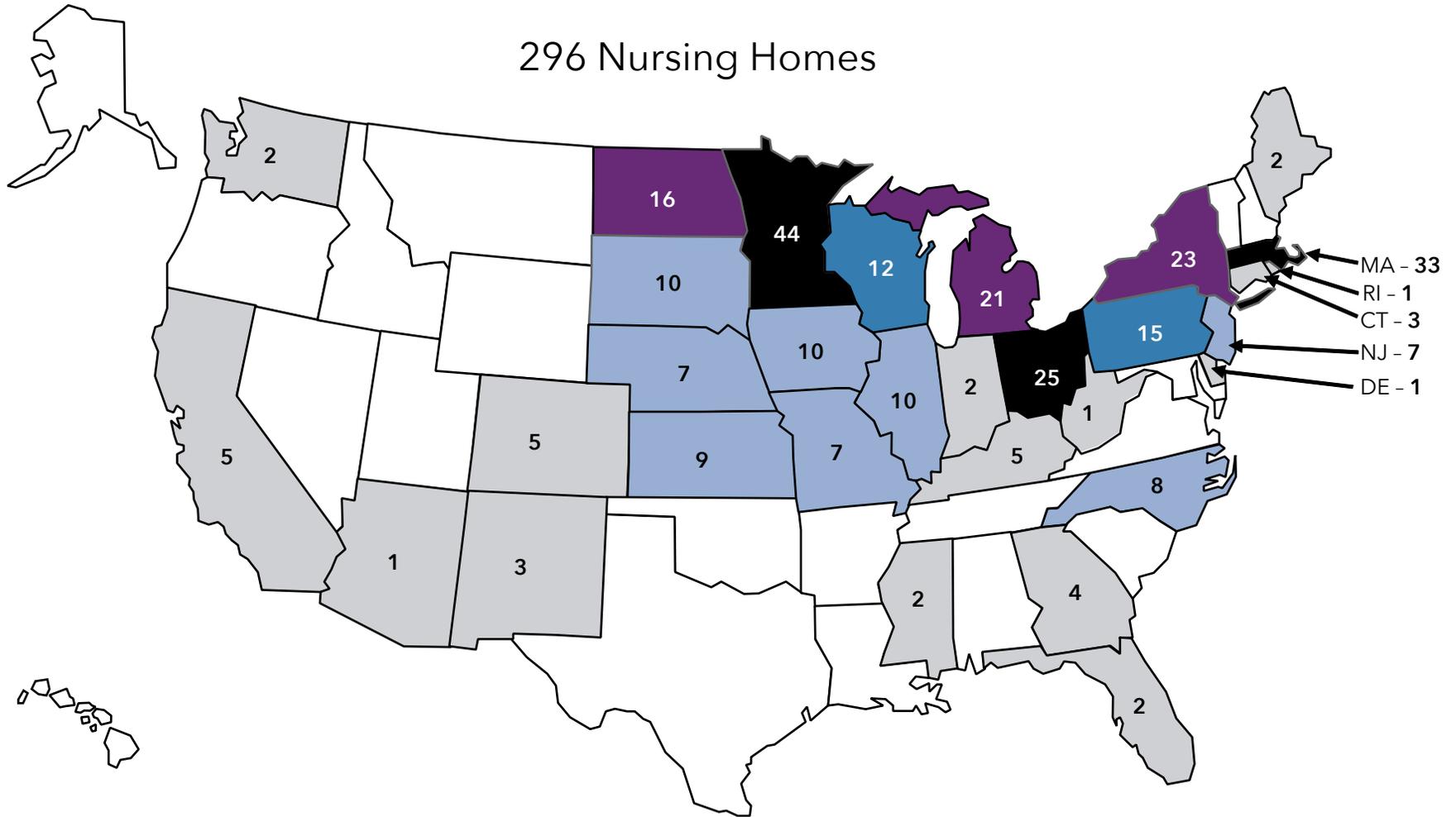


KEY:

- 1 to 5 LZ 200 ALs
- 6 to 10 LZ 200 ALs
- 11 to 15 LZ 200 ALs
- 16 to 25 LZ 200 ALs
- Over 25 LZ 200 ALs
- None

# Organizational Characteristics: Locations

## Nursing Home (NH) Locations



KEY:

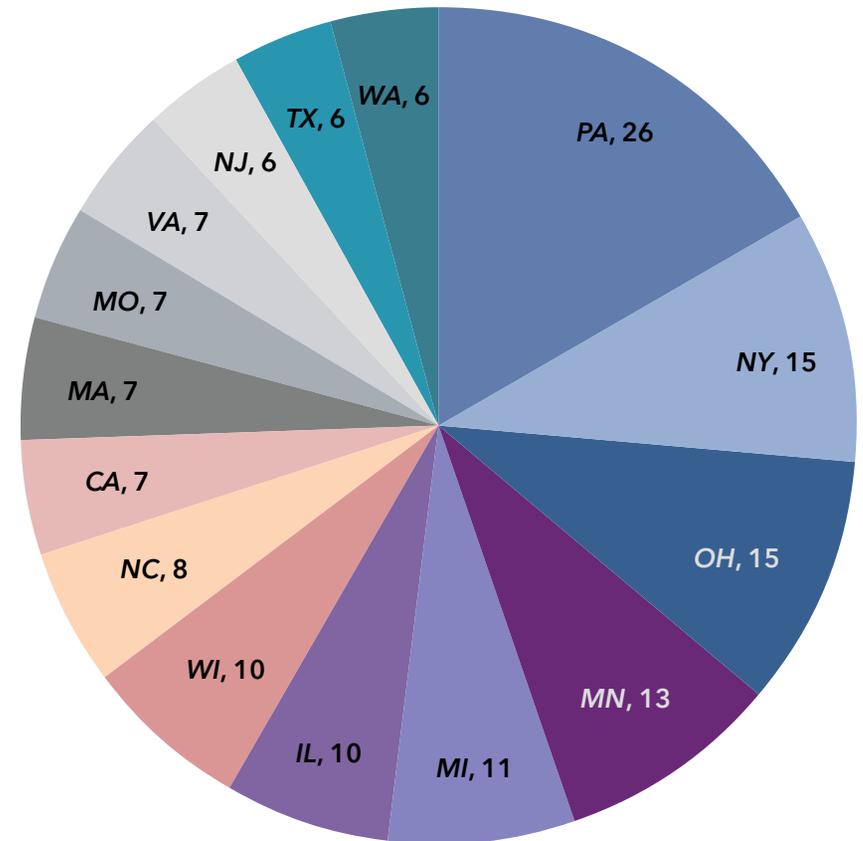


## Organizational Characteristics: System Headquarters

### States with Largest Number of Headquarters' Locations

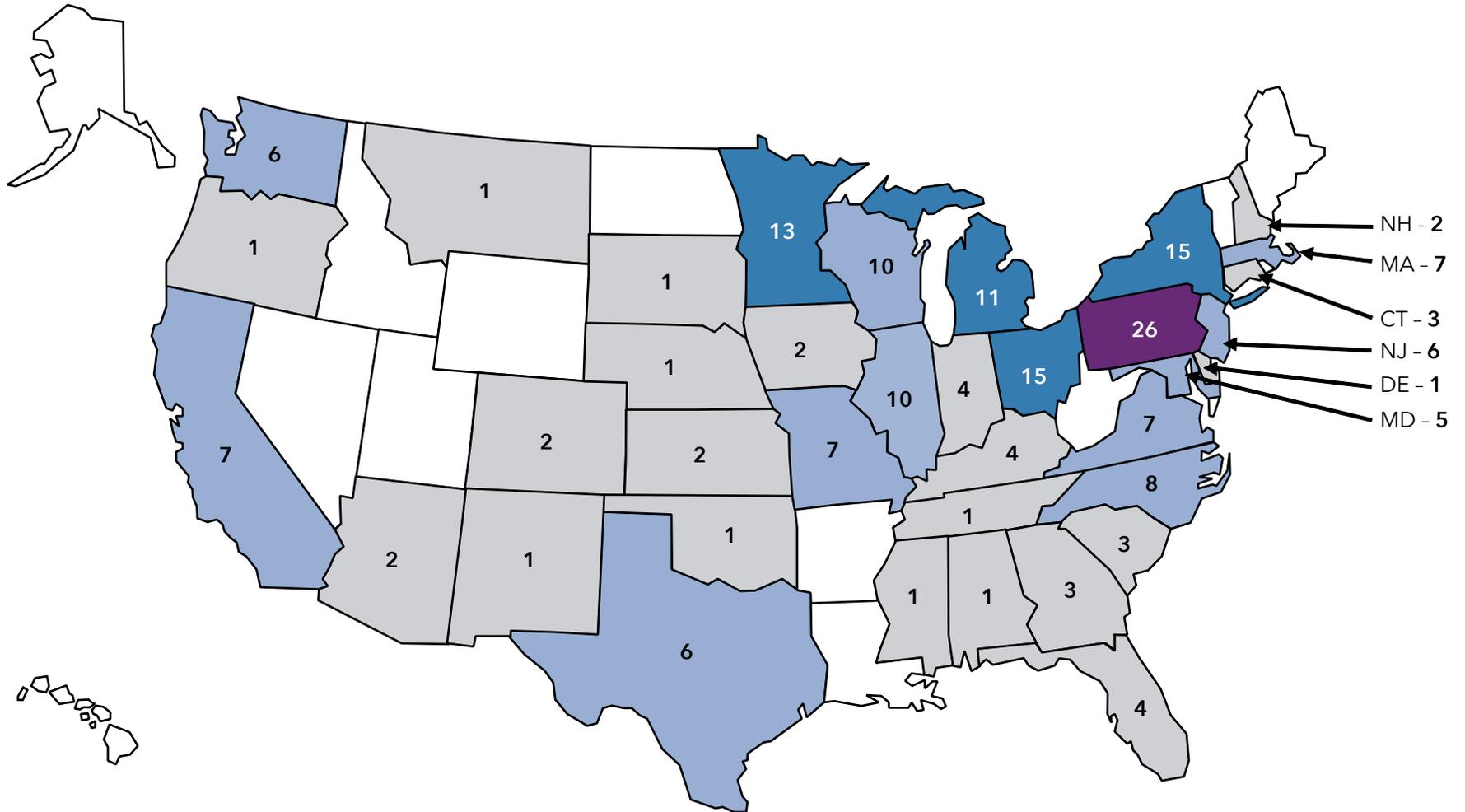
#### System Headquarters

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



# Organizational Characteristics: System Headquarters

## Headquarters' Locations

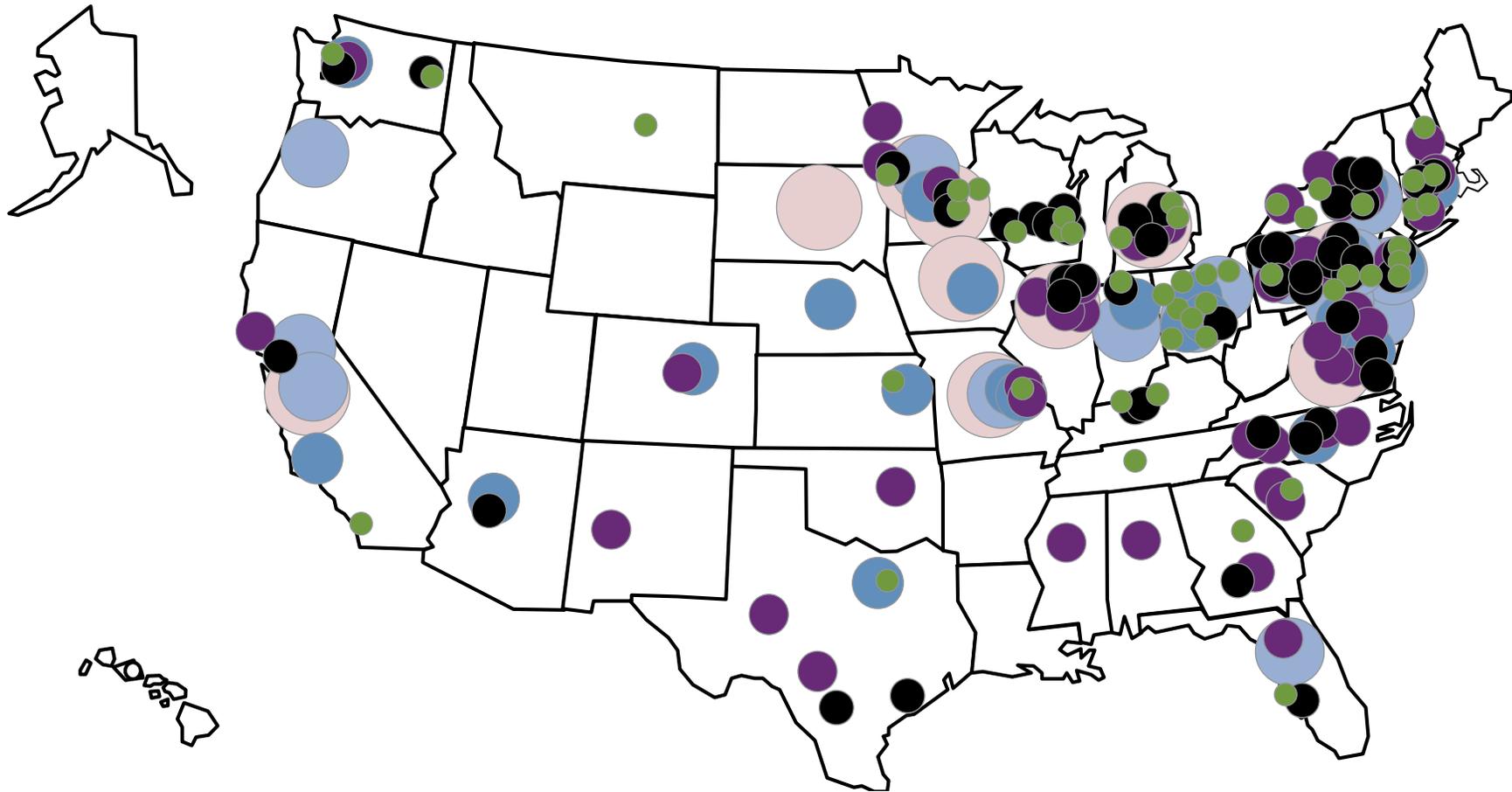


KEY:



# Organizational Characteristics: System Headquarters

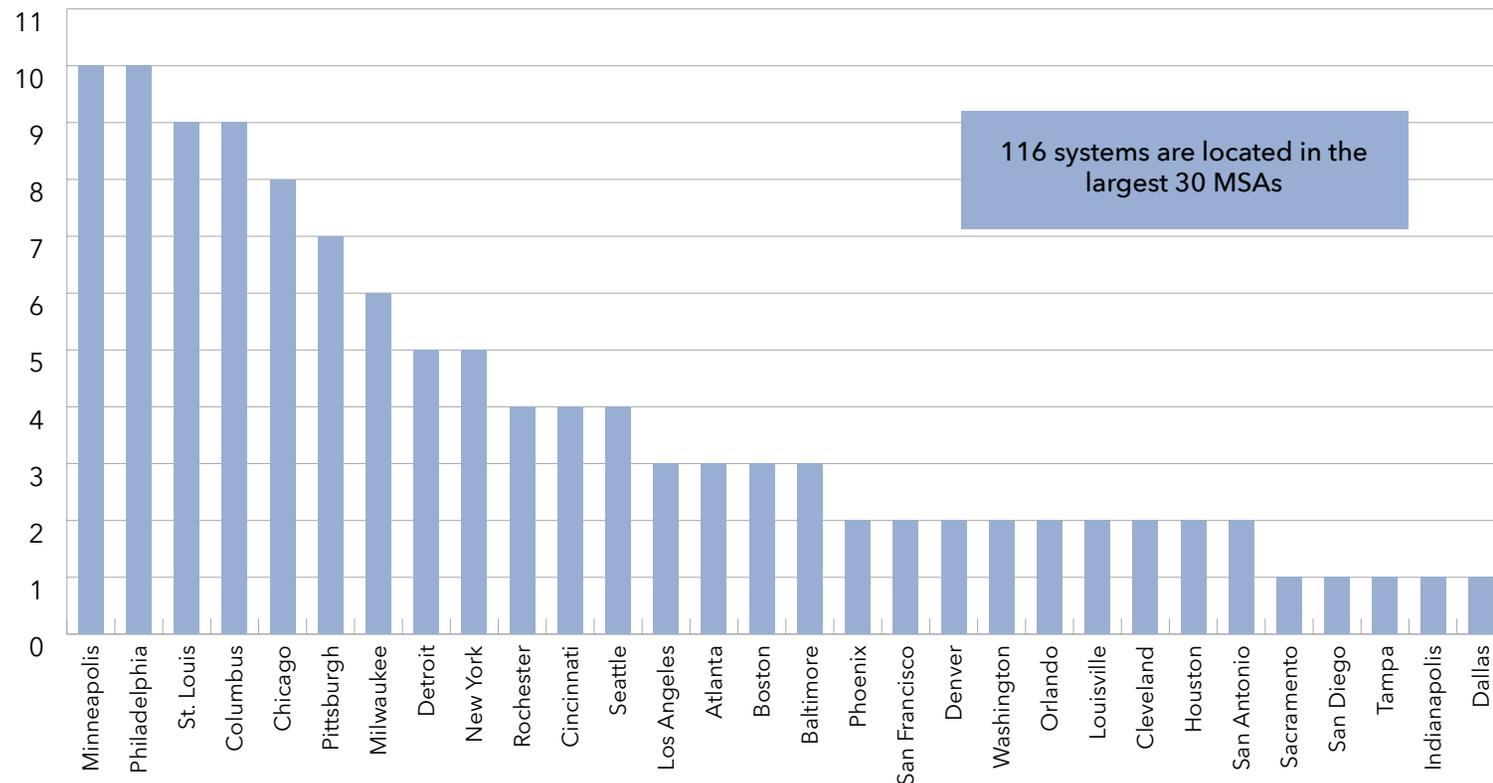
## Headquarters' Locations by Size



KEY:



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



### Metropolitan Statistical Areas (MSAs)

Metropolitan Statistical Areas (MSAs) are defined by the Office of Management and Budget (OMB) for purposes of tabulating statistics on clearly defined metropolitan boundaries. These boundaries are based on 2022 data from the U.S. Census Bureau. Areas are identified by county, with several counties making up a MSA. The locations of the communities owned by LZ 200 organizations in the largest 30 MSAs are charted, showing the number and type of communities within each of the MSAs.

## Organizational Characteristics: Geographic Classifications

### *Classifications*

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

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

- **National.** Systems whose properties are located among multiple states in more than one region of the United States. Several of the national

systems focus their operations either west or east of the Mississippi River or Rocky Mountains. A few of the national systems have an abundance of properties broadly scattered across the country, for example:

Pacific Retirement Services, Inc. (LZ 200 #17) – 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. Covenant Living Communities & Services (LZ 200 #8) is a national system with communities in multiple states across the country.

- **Across States.** Systems whose communities are located among multiple states, primarily in one region of the United States. Example: Acts Retirement-Life Communities (LZ 200 #4) is classified as an across states system with a focus in the Northeast, Mid-Atlantic and Southeast U.S. Another example: Lifespace Communities (LZ 200 #6) is classified as an across states system where its focus had been on the Midwest, Northeast and Southeast until their affiliations in the Southwest.

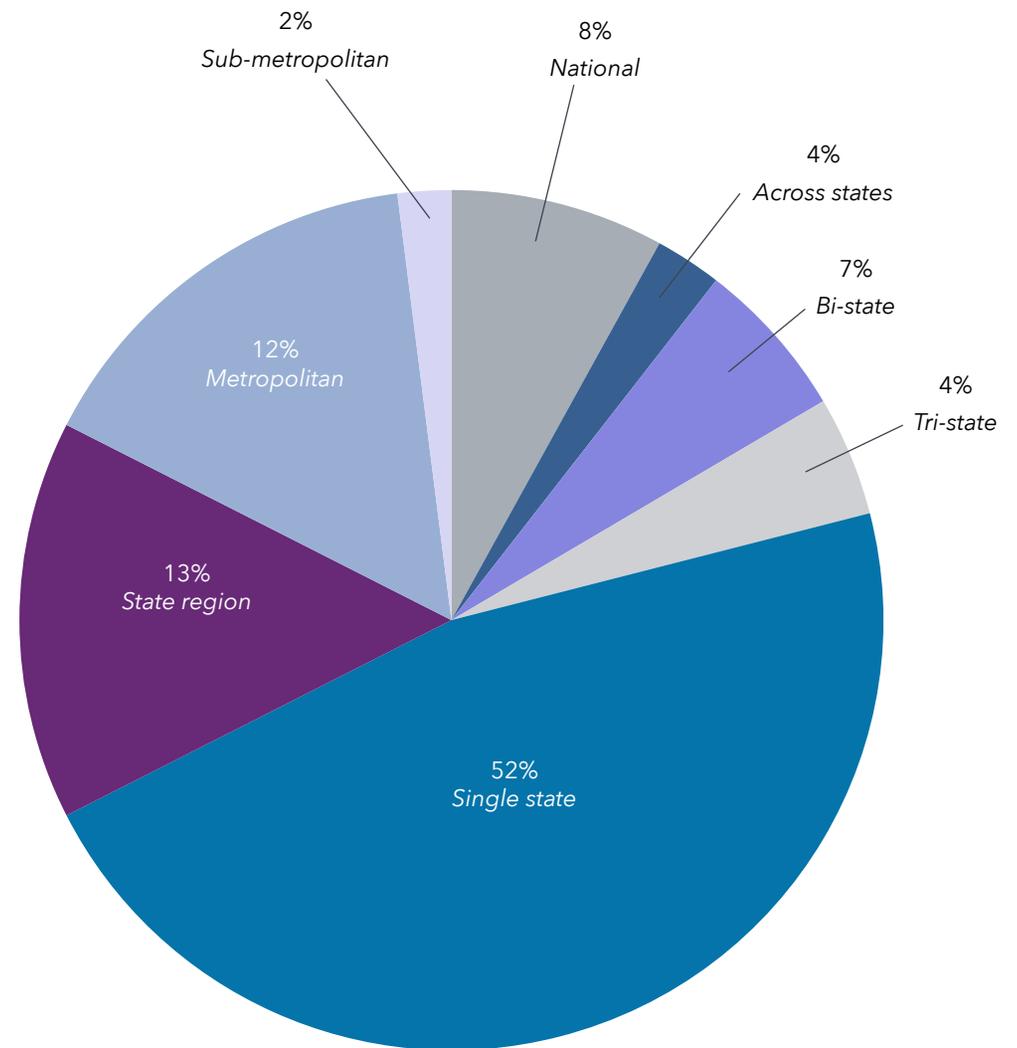
## Organizational Characteristics: Geographic Classifications (Continued)

- **Tri-state.** Systems whose communities are located across three states, typically contiguous. Example: BHI Senior Living's (LZ 200 #22) sole focus was Indiana until their recent affiliations expanding them into Michigan and Ohio.
- **Bi-state.** Systems whose communities are located across two states, typically contiguous. Example: Springpoint (LZ 200 #24) had all of its communities within New Jersey as of year-end 2016. In 2017, another organization affiliated with Springpoint, which now puts Springpoint communities in both New Jersey and Delaware, a Bi-state designation.
- **Single State.** Systems whose communities are contained within a single state's borders and are spread across the state. Example: Westminster Communities of Florida (LZ 200 #11) – multiple communities within Florida, spread across the state (from central Florida to north central Florida, east and west).
- **State Region.** Systems whose communities are contained within a single region within a single state's borders. Example: Methodist Retirement Communities (LZ 200 #51) – multiple communities centrally concentrated in Texas.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: Episcopal SeniorLife Communities (LZ 200 #134) – multiple communities throughout the greater Rochester, New York area.
- **Sub-metropolitan.** Systems whose communities are contained within a sub-section of a metropolitan area. The larger the metropolitan area, the more likely the possibility that a multi-site may emerge within a sub-metropolitan area. Example: The communities of Goodwin Living (LZ 200 #85) are in the southwestern quadrant of the DC-Arlington metropolitan area.

## Organizational Characteristics: Geographic Classifications

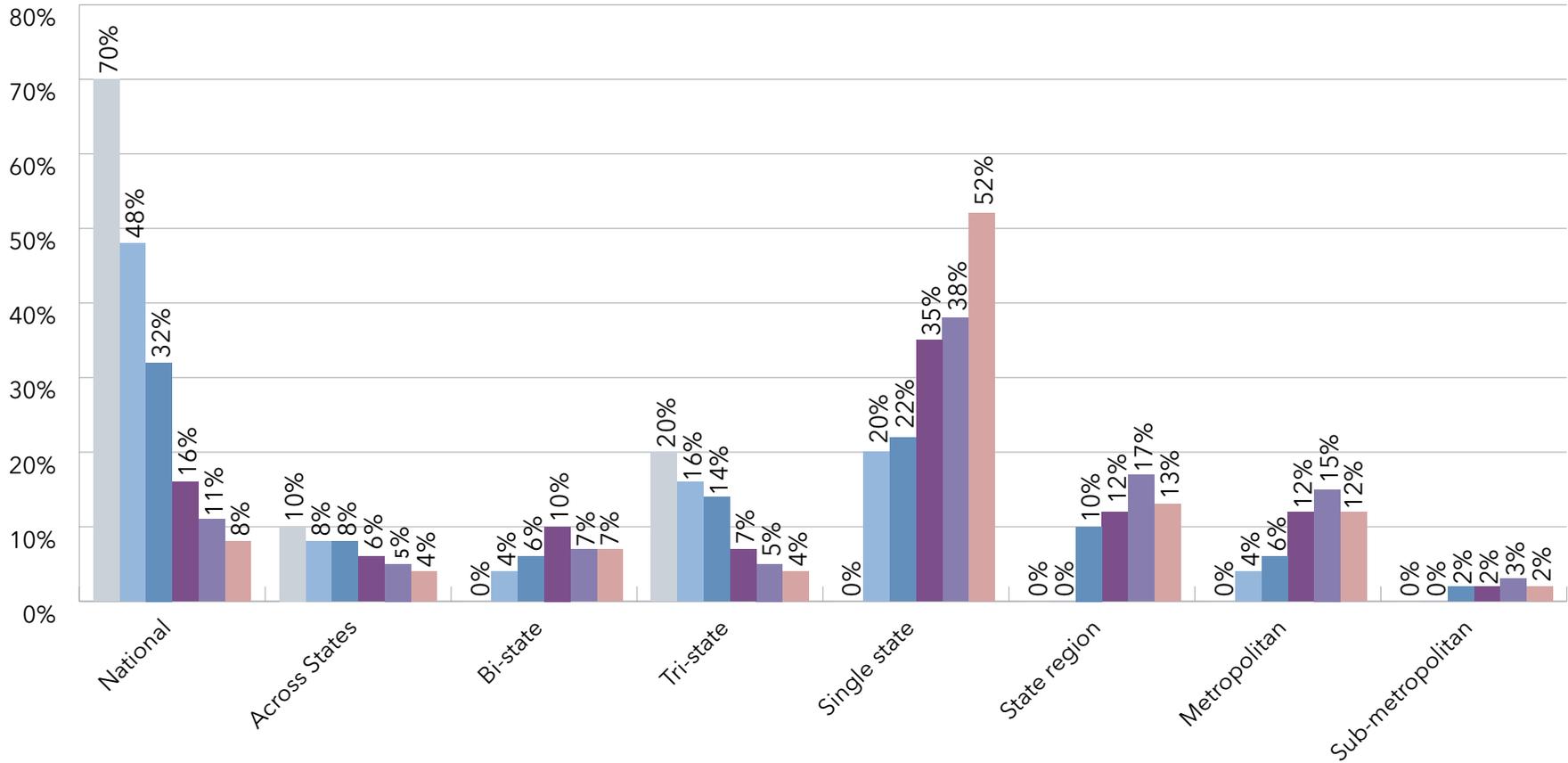
### Primary Classifications

Chart 4-6a shows that a large majority, more than 50%, of the LZ 200 organizations operate within a single state's boundaries (Single State, State Region, Metropolitan or Sub-metropolitan). Generally, a multi-site moves gradually from single state, to bi-state, to tri-state, and then to a national multi-site. For example, Augustana Care Corporation operated in the Minneapolis area for most of its existence. In the 2000s, it added communities in other areas of Minnesota. In 2011, it expanded to Colorado; and in 2018 affiliated with Elim Care (MN) (who operates in Minnesota and North Dakota), to become Cassia (LZ 200 #13). National multi-sites are 8.0% of the LZ 200 and tend to be among the largest of the LZ 200 organizations; however, as noted earlier, a smaller percentage of these national multi-sites have communities that are broadly spread across the country.



# Organizational Characteristics: Geographic Classifications

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



KEY:

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

## Analysis of the Data: Classifications

### Secondary Classifications

A multi-site may have a secondary market, as well. For example, bi-state multi-site Lutheran Senior Services (LZ 200 #15) has a secondary metropolitan market in St. Louis. The secondary classification provides a snapshot of a system's geographic concentration of communities. More than sixty-five (65) of the LZ 200 systems have such a market concentration. (Chart 4-6c)

Primary Classification	Secondary Classification	# Organizations
National	Across states	5
	Bi-state	1
	Single state	4
Across states	Single-state	3
	Metropolitan	2
Tri-state	Single-state	2
	Metropolitan	2
Bi-state	Single state	3
	State region	3
	Metropolitan	5
	Sub-metropolitan	1
Single-state	State region	14
	Metropolitan	13
State region	Metropolitan	5
	Sub-metropolitan	1
Metropolitan	Sub-metropolitan	2
Total Organizations with Secondary Classifications		66

## Organizational Characteristics: Corporate Name Changes in 2022

### Corporate Name Changes

An ongoing trend among senior living organizations throughout the country, is that of changing the name of the organization to better reflect the services provided. Section 4-7 lists the 2022 name changes.

2023 Rank	Current System Name	Logo	Previous System Name
72	Brio Living Services		UMRC and Porter Hills
83	Brightspire		The Presbyterian Homes, Inc.
85	Goodwin Living		Goodwin House Incorporated
117	Illuminus		Marquardt Village, Inc.
129	Futura Age		eliseo and Foss Home
148	ThriveMore		Baptist Retirement Homes of North Carolina, Inc.
160	FellowshipLIFE		Fellowship Senior Living

## Organizational Characteristics: Debt Ratings

### *Rated Debt as of 12/31/2022*

#### *Ratings*

There are currently three rating agencies that rate senior living debt: Fitch Ratings and Standard & Poor's, and Moody's, two of which, Standard & Poor's and Fitch Ratings, are currently active. A listing of multi-site organizations with debt rated by Fitch Ratings or Standard & Poor's is shown in Chart 4-8a. A multi-site with an "NR" shown as an agency's rating means that the multi-site did not have its debt rated by that agency as of 12/31/22. More than 60 of the LZ 200, including three of the Over 200, organizations have outstanding debt rated by Fitch Ratings and/or Standard & Poor's. Chart 4-8b presents the categories of each of the ratings, showing that the majority, 46%, of the ratings for LZ 200 organizations fall in the "BBB" category (that is, with ratings of "BBB+," "BBB" or "BBB-").

2023 Rank	System Name	State	Rated	
			Fitch	S&P
49	Immanuel	NE	AA	UNR
20	Concordia Lutheran Ministries	PA	UNR	AA-
1	National Senior Campuses	VA	A	UNR
12	Front Porch Communities and Services	CA	A	A-
18	Otterbein SeniorLife	OH	UNR	A
26	Masonic Villages	PA	UNR	A
29	Willow Valley Communities	PA	A	UNR
43	Buckner Retirement Services, Inc	TX	A	UNR
111	The Moorings, Incorporated	FL	A	A+
4	Acts Retirement-Services, Inc.	PA	A-	UNR
7	HumanGood	CA	A-	UNR
8	Covenant Retirement Communities	IL	A-	UNR
11	Westminster Communities of Florida	FL	A-	UNR
57	Presbyterian Homes	IL	A-	UNR
92	The RiverWoods Group	NH	A-	UNR

## Organizational Characteristics: Debt Ratings (Continued)

### Rated Debt as of 12/31/2022

2023 Rank	System Name	State	Rated	
			Fitch	S&P
100	Givens Estates	NC	A-	UNR
107	Sun Health Services	AZ	A-	UNR
133	Emerald Communities	WA	A-	UNR
192	Community First Solutions	OH	A-	UNR
19	Presbyterian Senior Living	PA	BBB+	UNR
24	Springpoint Senior Living	NJ	BBB+	UNR
59	Masonicare	CT	BBB+	UNR
64	Diakon Lutheran Social Ministries	PA	BBB+	UNR
83	Brightspire fka The Presbyterian Homes	NC	BBB+	UNR
85	Goodwin Living fka Goodwin House Incorporated	VA	BBB+	UNR
121	Sunnyside Presbyterian Home	VA	BBB+	UNR
Over 200	Three Pillars Senior Living Community	WI	BBB+	UNR
6	Lifespace Communities, Inc.	IA	BBB	UNR
7	HumanGood	PA	BBB	UNR
14	Asbury Communities, Inc.	MD	BBB	UNR
15	Lutheran Senior Services	MO	BBB	UNR
22	BHI Senior Living, Inc.	IN	BBB	UNR
23	Ohio Living	OH	BBB	UNR
38	Franciscan Communities, Inc.	IL	BBB	UNR
41	Bethesda Health Group	MO	BBB	UNR
54	Lifespire of Virginia	VA	BBB	UNR
88	UMRH, Inc.	NC	BBB	UNR
187	Loomis Communities Inc.	MA	UNR	BBB
37	Greencroft Communities	IN	BBB-	UNR

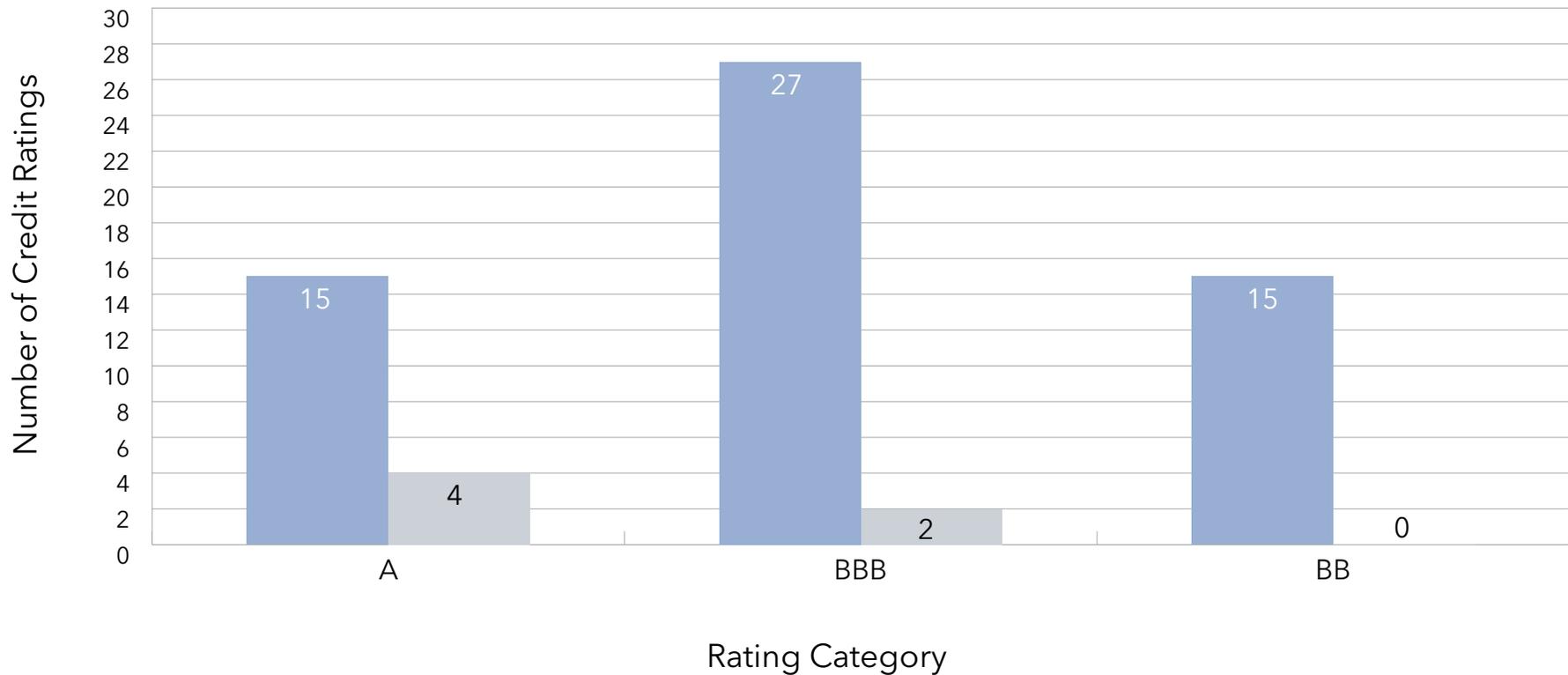
## Organizational Characteristics: Debt Ratings (Continued)

### Rated Debt as of 12/31/2022

2023 Rank	System Name	State	Rated	
			Fitch	S&P
44	Life Enriching Communities	OH	BBB-	UNR
50	Eskaton	CA	UNR	BBB-
67	Holland Home	MI	BBB-	UNR
72	Brio Living Services fka UMRC and Porter Hills	MI	BBB-	UNR
93	EveryAge fka United Church Homes and Servcies	NC	BBB-	UNR
106	Landis Communities	PA	BBB-	UNR
143	Messiah Lifeways	PA	BBB-	UNR
149	Friends Homes, Inc.	NC	BBB-	UNR
177	Judson Services	OH	BBB-	UNR
21	The Carmelite System	NY	BB+	UNR
71	Friendship Village St. Louis	MO	BB+	UNR
91	Haverland Carter Lifestyle Group	NM	BB+	UNR
95	Blue Skies of Texas	TX	BB+	UNR
119	Westminster-Canterbury on Chesapeake Bay	VA	BB+	UNR
135	Morningside Ministries	TX	BB+	UNR
137	Brazos Presbyterian Homes	TX	BB+	UNR
175	Eliza Jennings Senior Care Network	OH	BB+	UNR
Over 200	Wesley Woods	GA	BB+	UNR
27	Transforming Age	WA	BB	UNR
46	Christian Horizons	MO	BB	UNR
58	Presbyterian Villages of Michigan	MI	BB	UNR
65	Wesley Enhanced Living	PA	BB	UNR
166	EHM Senior Solutions	MI	BB	UNR
Over 200	Morningstar Senior Living	PA	BB	UNR

## Organizational Characteristics: Debt Ratings

### Ratings by Category



48 ratings in "A" & "BBB" Category  
15 in "BB" Category  
63 total ratings of debt for 61 organizations

KEY: ■ Fitch ■ S&P

## Analysis of the Data: Revenue

### *Annual Revenue by Organization*

#### *Revenues*

Several years ago, the LZ 200 publication began capturing the type of revenue generated by each respective organization. As an additional means of evaluating the size of each organization, in addition to the total number of units and communities, overall revenue was also surveyed. Most of the organizations provided this information. To avoid detailing each organization's total revenue for fiscal year 2022, organizations were grouped into tiers based on their overall revenue. The largest LZ 200 organizations have revenues beyond \$200 million (20 organizations). The largest number of LZ 200 organizations fall within the Tier III category, which reflects annual revenue between \$50 million and \$99 million. Section 4-9 details the revenue statistics. It should be noted that revenue figures included in the report are taken directly from survey responses and are not independently verified.

	Number of LZ 200 Organizations	% of Total LZ 200
Tier I: > \$200 million	20	13.7%
Tier II: \$100-\$199 million	31	21.2%
Tier III: \$50-\$99 million	55	37.7%
Tier IV: \$25-\$49 million	36	24.7%
Tier V: < \$25 million	4	2.7%

n = 146

## Analysis of the Data: Revenue

### *Annual Revenue by Organization*

2023 Rank	System	State	Annual Revenue Tier
1	National Senior Communities	VA	Tier I
42	Covenant Health	MA	Tier I
7	HumanGood	CA	Tier I
4	Acts Retirement-Life Communities	PA	Tier I
3	Presbyterian Homes & Services	MN	Tier I
12	Front Porch Communities and Services	CA	Tier I
34	National Church Residences	OH	Tier I
8	Covenant Living Communities & Services	IL	Tier I
6	Lifespace Communities, Inc.	IA	Tier I
10	Benedictine	MN	Tier I
13	Cassia	MN	Tier I
14	Asbury Communities, Inc.	MD	Tier I
11	Westminster Retirement Communities of Florida	FL	Tier I
52	Hebrew SeniorLife	MA	Tier I
20	Concordia Lutheran Ministries	PA	Tier I
18	Otterbein SeniorLife	OH	Tier I
26	Masonic Villages of the Grand Lodge of PA	PA	Tier I
15	Lutheran Senior Services	MO	Tier I
23	Ohio Living	OH	Tier I
24	Springpoint Senior Living	NJ	Tier I
27	Transforming Age	WA	Tier II
72	Brio Living Services fka UMRC and Porter Hills	MI	Tier II
22	BHI Senior Living, Inc.	IN	Tier II
180	St. Paul's Senior Services	CA	Tier II
59	Masonicare	CT	Tier II

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

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2023 Rank	System	State	Annual Revenue Tier
50	Eskaton	CA	Tier II
67	Holland Home	MI	Tier II
33	Ecumen	MN	Tier II
35	WesleyLife	IA	Tier II
48	Presbyterian SeniorCare Network	PA	Tier II
40	Lutheran Services Carolinas	NC	Tier II
82	Lutheran SeniorLife	PA	Tier II
57	Presbyterian Homes	IL	Tier II
74	Legacy Lifecare	MA	Tier II
29	Willow Valley Communities	PA	Tier II
111	The Moorings, Incorporated	FL	Tier II
142	Ascentria Care Alliance	MA	Tier II
38	Franciscan Communities, Inc.	IL	Tier II
85	Goodwin Living fka Goodwin House Incorporated	VA	Tier II
36	Homewood Retirement Centers. Inc.	MD	Tier II
32	Presbyterian Manors of Mid-America	KS	Tier II
44	Life Enriching Communities	OH	Tier II
69	Phoebe Ministries	PA	Tier II
47	United Church Homes, Inc.	OH	Tier II
51	Methodist Retirement Communities	TX	Tier II
54	Lifespire of Virginia	VA	Tier II
78	Ingleside	MD	Tier II
93	EveryAge	NC	Tier II
43	Buckner Retirement Services	TX	Tier II
125	Samaritas	MI	Tier II

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

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

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2023 Rank	System	State	Annual Revenue Tier
89	Felician Services, Inc.	IL	Tier II
108	Alliance Health & Human Services	MA	Tier III
41	Bethesda Health Group, Inc.	MO	Tier III
68	SpiriTrust Lutheran	PA	Tier III
64	Diakon	PA	Tier III
79	Eventide	MN	Tier III
37	Greencroft Communities	IN	Tier III
66	American Baptist Homes of the Midwest	MN	Tier III
90	Pinnacle Living	VA	Tier III
30	Bethesda Senior Living Communities	CO	Tier III
127	Christian Health	NJ	Tier III
65	Wesley Enhanced Living	PA	Tier III
70	Wesley	WA	Tier III
88	UMRH, Inc.	NC	Tier III
76	Providence Life Services	IL	Tier III
97	Christian Living Communities	CO	Tier III
178	Knute Nelson	MN	Tier III
126	Ebenezer Society	MN	Tier III
84	Lutheran Homes of South Carolina Inc.	SC	Tier III
83	Brightspire fka The Presbyterian Homes	NC	Tier III
58	Presbyterian Villages of Michigan	MI	Tier III
105	United Methodist Communities	NJ	Tier III
31	Christian Care Companies	AZ	Tier III
99	St. Ann's of Greater Rochester, Inc.	NY	Tier III
119	Westminster-Canterbury on Chesapeake Bay	VA	Tier III

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

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

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2023 Rank	System	State	Annual Revenue Tier
100	Givens Communities	NC	Tier III
104	Saint Therese	MN	Tier III
150	Episcopal Communities & Services	CA	Tier III
86	Presbyterian Communities of South Carolina	SC	Tier III
92	The RiverWoods Group	NH	Tier III
80	Friendship Senior Options	IL	Tier III
116	Presbyterian Homes of Georgia, Inc.	GA	Tier III
96	Methodist Homes of Alabama & Northwest Florida	AL	Tier III
107	Sun Health Services	AZ	Tier III
53	Mississippi Methodist Senior Services, Inc.	MS	Tier III
113	Christian Care Communities	KY	Tier III
75	United Methodist Homes	NY	Tier III
144	Well•Spring Group	NC	Tier III
197	A.G. Rhodes	GA	Tier III
157	The Legacy Senior Communities	TX	Tier III
146	Smith Senior Living	IL	Tier III
109	Mather	IL	Tier III
124	United Church of Christ Homes	PA	Tier III
91	Haverland Carter Lifestyle Group	NM	Tier III
176	Episcopal Retirement Services	OH	Tier III
121	Sunnyside Communities	VA	Tier III
73	Baruch Senior Ministries	MI	Tier III
95	Blue Skies of Texas	TX	Tier III
114	Living Branches	PA	Tier III
143	Messiah Lifeways	PA	Tier III

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

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

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2023 Rank	System	State	Annual Revenue Tier
110	Garden Spot Communities	PA	Tier III
160	FellowshipLIFE fka Fellowship Senior Living	NJ	Tier III
101	Lutheran Social Ministries of MD	MD	Tier III
103	Masonic Homes of Ky, Inc.	KY	Tier III
131	Simpson Senior Services	PA	Tier III
192	Community First Solutions	OH	Tier III
102	Menno Haven, Inc.	PA	Tier IV
106	Landis Communities	PA	Tier IV
193	Genacross Lutheran Services	OH	Tier IV
94	St. Andrew's Resources for Seniors System	MO	Tier IV
117	Illuminus fka Marquardt Village, Inc.	WI	Tier IV
115	LutherCare	PA	Tier IV
55	Baptist Village Communities	OK	Tier IV
161	St. John's United	MT	Tier IV
25	Retirement Housing Foundation	CA	Tier IV
140	Ohio Masonic Home	OH	Tier IV
158	Friendly Senior Living	NY	Tier IV
149	Friends Homes, Inc.	NC	Tier IV
154	Baptist Senior Services	PA	Tier IV
134	Episcopal SeniorLife Communities	NY	Tier IV
163	Bluestem Communities	KS	Tier IV
135	Morningside Ministries	TX	Tier IV
198	Parker	NJ	Tier IV
169	Redstone Presbyterian SeniorCare	PA	Tier IV
130	Vista Prairie Communities	MN	Tier IV

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

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2023 Rank	System	State	Annual Revenue Tier
186	The Lutheran Home Inc.	WI	Tier IV
171	Christian Village Communities	OH	Tier IV
185	Beechwood Continuing Care, Inc.	NY	Tier IV
118	Wesley Willows	IL	Tier IV
137	Brazos Presbyterian Homes Inc.	TX	Tier IV
165	Medford Leas	NJ	Tier IV
132	Bethany Lutheran Homes Inc.	WI	Tier IV
148	ThriveMore fka Baptist Retirement Homes of North Carolina, Inc.	NC	Tier IV
128	Benevolent Corporation Cedar Community	WI	Tier IV
184	Good Shepherd Communities	NY	Tier IV
138	Sunset Senior Communities	MI	Tier IV
170	Rockwood Retirement Communities	WA	Tier IV
179	St. Edward Home	OH	Tier IV
172	Willow Brook Christian Communities	OH	Tier IV
196	Wesbury	PA	Tier IV
199	South Carolina Baptist Ministry of Aging (SCBMA)	SC	Tier IV
194	Convivial Life Inc.	FL	Tier IV
200	Jewish Senior Life of Metropolitan Detroit	MI	Tier V
181	Bethany St. Joseph Corporation	WI	Tier V
195	Skaalen Retirement Services	WI	Tier V
153	Lutheran Life Villages	IN	Tier V

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million; Tier V: < \$25 Million  
 Revenue figures not independently verified and only reported for those who provided the information.

## Analysis of the Data: Corporate Structure

### Most Common Corporate Positions Created in 2022

#### Corporate Staff

Yet another area of the 2023 LZ 200 is an analysis of the corporate level staffing of select operating areas for the LZ 200 organizations (Charts 4-10a-c).

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

Positions Added	Number of LZ 200 Adding the Position
Director of Healthcare Marketing & Sales	10
Director of Strategy/Strategic Initiatives	10
Director of Talent/Recruiting/Human Resources	9
Director of Community Support/Purposeful Living	8
Chief of Resident Services/Healthcare	7
Chief Operations Officer	6
Director of Capital Projects/Development	4
Chief Financial Officer/Accountant	3
Chief Information/Technology Officer	2
Chief Clinical Services	1
Compliance Officers	1
Divisional Regional Managers	1

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

## Analysis of the Data: Corporate Structure

### Corporate Staffing Changes

2023 Rank	System Name	State	Current (YE 2022)	Previous
CEO				
9	Trinity Health Senior Communities	MI	Janice Hamilton-Crawford	Steven Kastner
38	Franciscan Communities	IL	Regina Umansky	Judy Amiano
104	Saint Therese	MN	Craig Abbott	Barbara Rode
105	United Methodist Communities	NJ	J. Mark Lenhard	Lawrence Carlson
125	Samaritas	MI	Dave Morin	Sam Beals
134	Episcopal SeniorLife Communities	NY	Lisa Marcello	Loren Ranaletta
180	St. Paul's Senior Services	CA	Michael McHale	Cheryl Wilson
191	Baptist Life Communities	KY	Effie McIntosh	Robert Long
CFO				
9	Trinity Health Senior Communities	MI	Marcus Bowens	Kristin Signor
33	Ecumen	MN	Scott Bjerketvedt	Morshed Alam
44	Life Enriching Communities	OH	Kevin McDonnell	Jim Bowersox
58	Presbyterian Villages of Michigan	MI	Bruce Blalock	Brian Carnaghi
61	SantaFe Senior Living	FL	Philip Bowling	Vacant
86	Presbyterian Communities of South Carolina	SC	Vacant	W. Chad Melven
102	Menno Haven	PA	Alisa Miller (Interim)	David Gentry
110	Garden Spot Communities	PA	Nate Weber	Dale Beiler
133	Emerald Communities	WA	Diana Jamison	Vacant
134	Episcopal SeniorLife Communities	NY	Jessica Thomsen	Lisa Marcello
135	Morningside Ministries	TX	Myranda Prater	Matthew Scott
197	A.G. Rhodes	GA	Vacant	Rhett Austin

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

### Corporate Staffing Changes

2023 Rank	System Name	State	Current (YE 2022)	Previous
COO				
3	Presbyterian Homes & Services	MN	Vacant	Duane Larson
4	Acts Retirement-Life Communities	PA	Jonathan Grant	Charles Coxson, III
10	Benedictine	MN	Anneliese Peterson	Steve Przybilla
38	Franciscan Communities	IL	Karen Larson	Zach Zerbonia
66	American Baptist Homes of the Midwest	MN	Vacant	Shanna Eckberg
68	SpitiTrust Lutheran	PA	Melissa Frownfeller	Vacant
143	Messiah Lifeways	PA	Kim Valvo	Kelli Mills
184	Good Shepherd Communities	NY	Jason Santiago	Patricia Mackey
190	Bethesa	MN	Ashley Bormann	Vacant
191	Baptist Life Communities	KY	Kristi Hilbert	Vacant
CIO/CTO				
3	Presbyterian Homes & Services	MN	Kory Nadeau	Randy Kirsch
26	Masonic Villages of the Grand Lodge	PA	Joseph Franco	Donald Johnston
42	Covenant Health	MA	Uday Madasu	Karen Bowling
57	Presbyterian Homes	IL	Vacant	Danny Weinberger
97	Christian Living Communities	CO	Brenda Johnson	Kevin Stromberg
106	Landis Communities	PA	Vacant	Dale Weaver
107	Sun Health Services	AZ	John Couture	Tony Yi
119	Westminster-Canterbury on Chesapeake Bay	VA	Ed Lawson	Richard Hoherz
134	Episcopal SeniorLife Communities	NY	Paul Burke	Vacant

## Analysis of the Data: Corporate Structure

### Corporate Tenure

Position	Average Tenure (years)	n*
CEO	10.04	141
CFO	6.61	134
COO	4.20	84
CIO	7.31	86

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

## Organizational Characteristics: Accreditation

### *Accredited Communities*

#### *Accreditation*

For senior living organizations, accreditation may be sought through several accrediting bodies (Charts 4-11a-b). The listing of LZ 200 with organizations that have obtained CARF (Commission on Accreditation of Rehabilitation Facilities), JCAHO (Joint Commission on the Accreditation of Healthcare Organizations), or EAGLE (Educational Assessment Guidelines Leading toward Excellence) accreditation is shown in Chart 4-11a-b. A total of 109 communities within the LZ 200 are accredited through CARF; 38 have sought accreditation through JCAHO, and an additional 35 are accredited through EAGLE.



## Organizational Characteristics: Accreditation

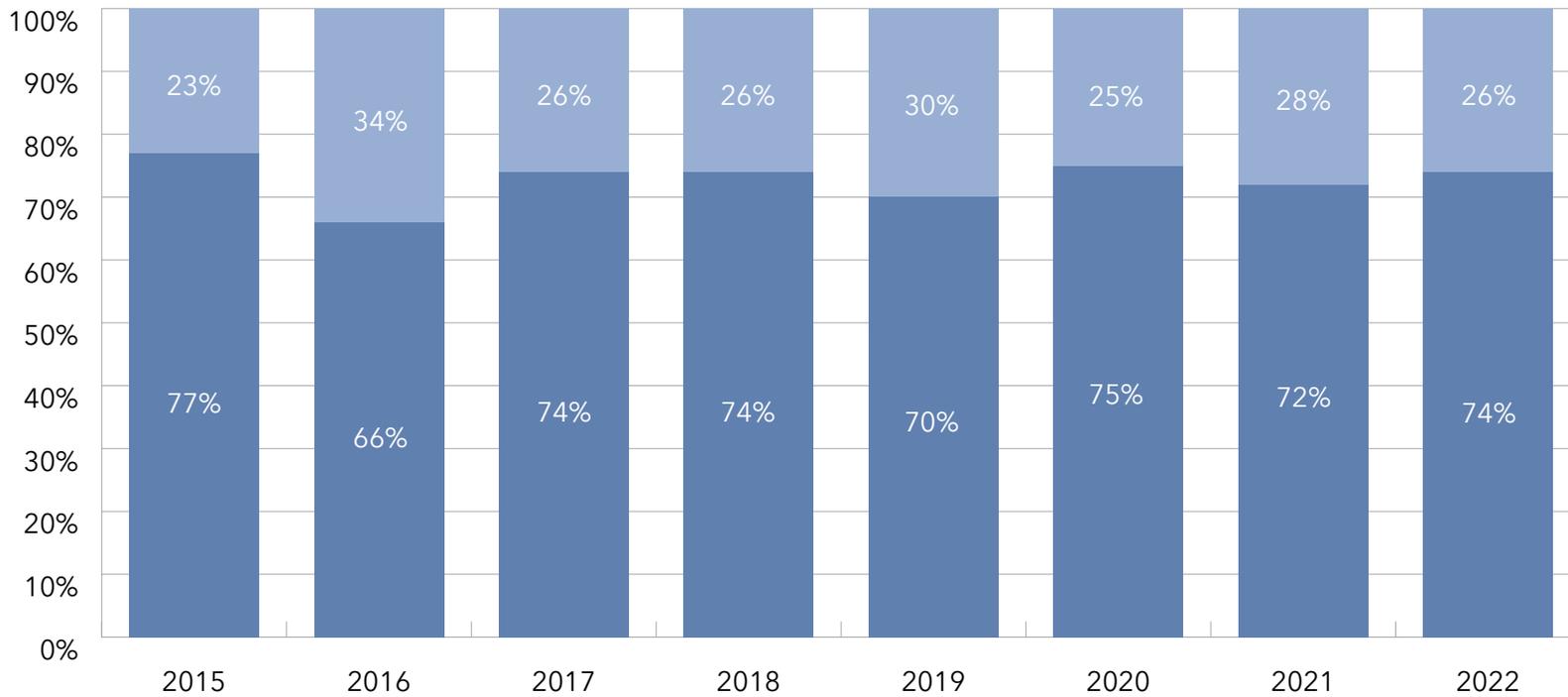
### Accredited Communities

2023 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
48	Presbyterian SeniorCare Network	PA	27	0	0
20	Concordia Lutheran Ministries	PA	23	0	0
34	National Church Residences	OH	12	0	0
18	Otterbein SeniorLife	OH	0	0	14
72	Brio Living Services fka UMRC and Porter Hills	MI	0	0	13
14	Asbury Communities, Inc.	MD	0	0	8
16	The Kendal Corporation	DE	7	1	0
108	Alliance Health & Human Services	MA	0	7	0
38	Franciscan Communities, Inc.	IL	0	6	0
76	Providence Life Services	IL	0	6	0
74	Legacy Lifecare	MA	0	5	0
142	Ascentria Care Alliance	MA	0	5	0
90	Pinnacle Living	VA	4	0	0
105	United Methodist Communities	NJ	0	0	4
78	Ingleside	MD	3	0	0
85	Goodwin Living fka Goodwin House Incorporated	VA	3	0	0
169	Redstone Presbyterian SeniorCare	PA	3	0	0
187	Loomis Communities Inc.	MA	3	0	0
197	A.G. Rhodes	GA	0	3	0

2023 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
170	Rockwood Retirement Communities	WA	2	0	2
95	Blue Skies of Texas	TX	2	1	0
52	Hebrew SeniorLife	MA	2	0	0
100	Givens Communities	NC	2	0	0
101	Lutheran Social Ministries of MD	MD	2	0	0
137	Brazos Presbyterian Homes Inc.	TX	2	0	0
146	Smith Senior Living	IL	2	0	0
165	Medford Leas	NJ	2	0	0
1	National Senior Communities	VA	1	1	0
42	Covenant Health	MA	1	1	0
118	Wesley Willows	IL	1	0	1
59	Masonicare	CT	1	0	0
92	The RiverWoods Group	NH	1	0	0
106	Landis Communities	PA	1	0	0
111	The Moorings, Incorporated	FL	1	0	0
144	Well•Spring Group	NC	1	0	0
89	Felician Services, Inc.	IL	0	1	0
127	Christian Health	NJ	0	1	0
196	Wesbury	PA	0	0	1

# Organizational Characteristics: Accreditation

## At Least One Accredited Community



n = 148

KEY:

Not Accredited
  Accredited

109 Accredited Communities through CARF

38 Accreditations through JCAHO

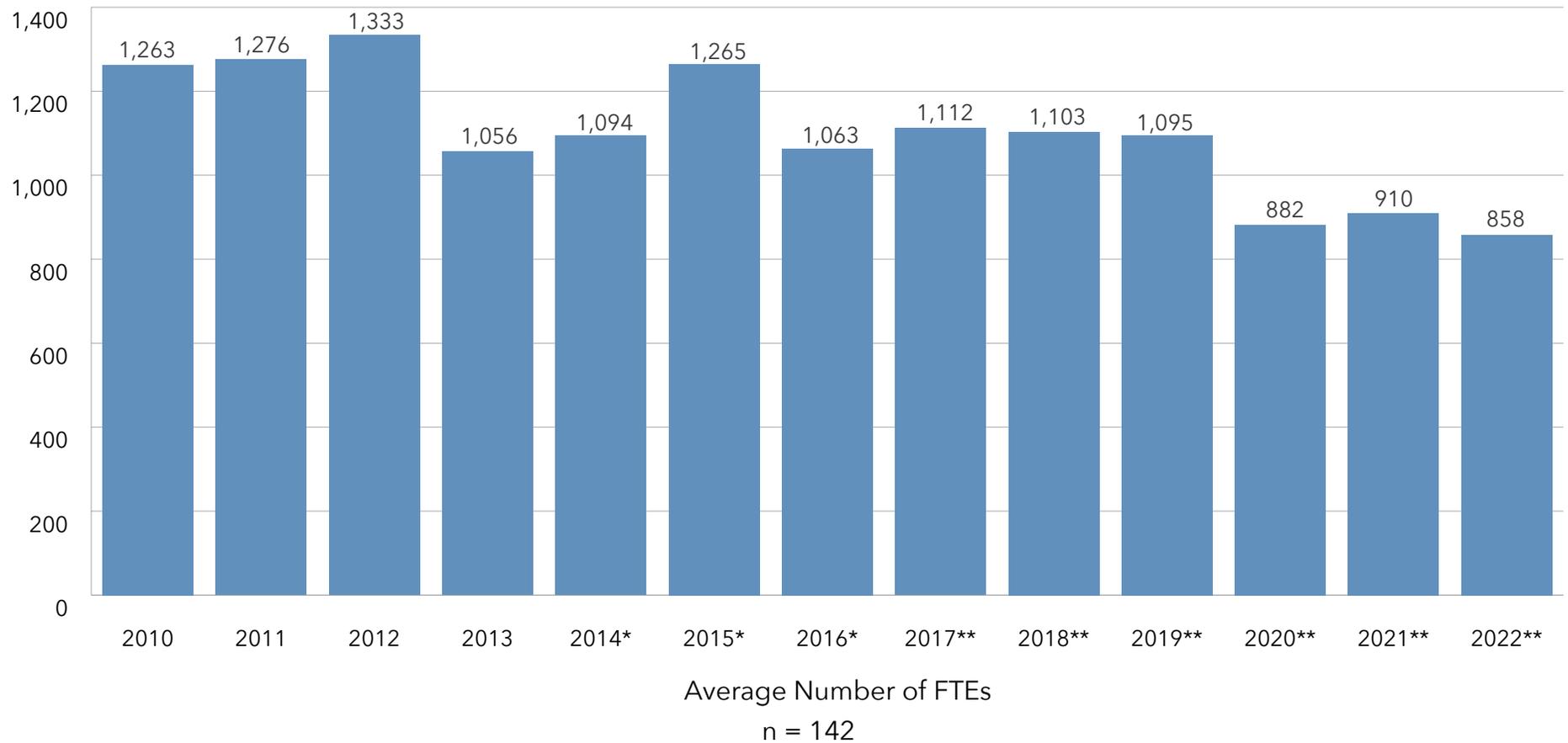
35 Accreditations through EAGLE

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

## Organizational Characteristics: Staffing

### Average Number of Employees, 2010-2022

2022\*\* Average FTE/Resident: 0.53



2010-2012 reflect changes to the largest 100.  
 \*2013-2016 reflect changes to the largest 150.  
 \*\*2017-2022 reflect changes to the largest 200.

## Analysis of the Data: Staffing

### Summary of Employees, 2010-2022

#### Staffing

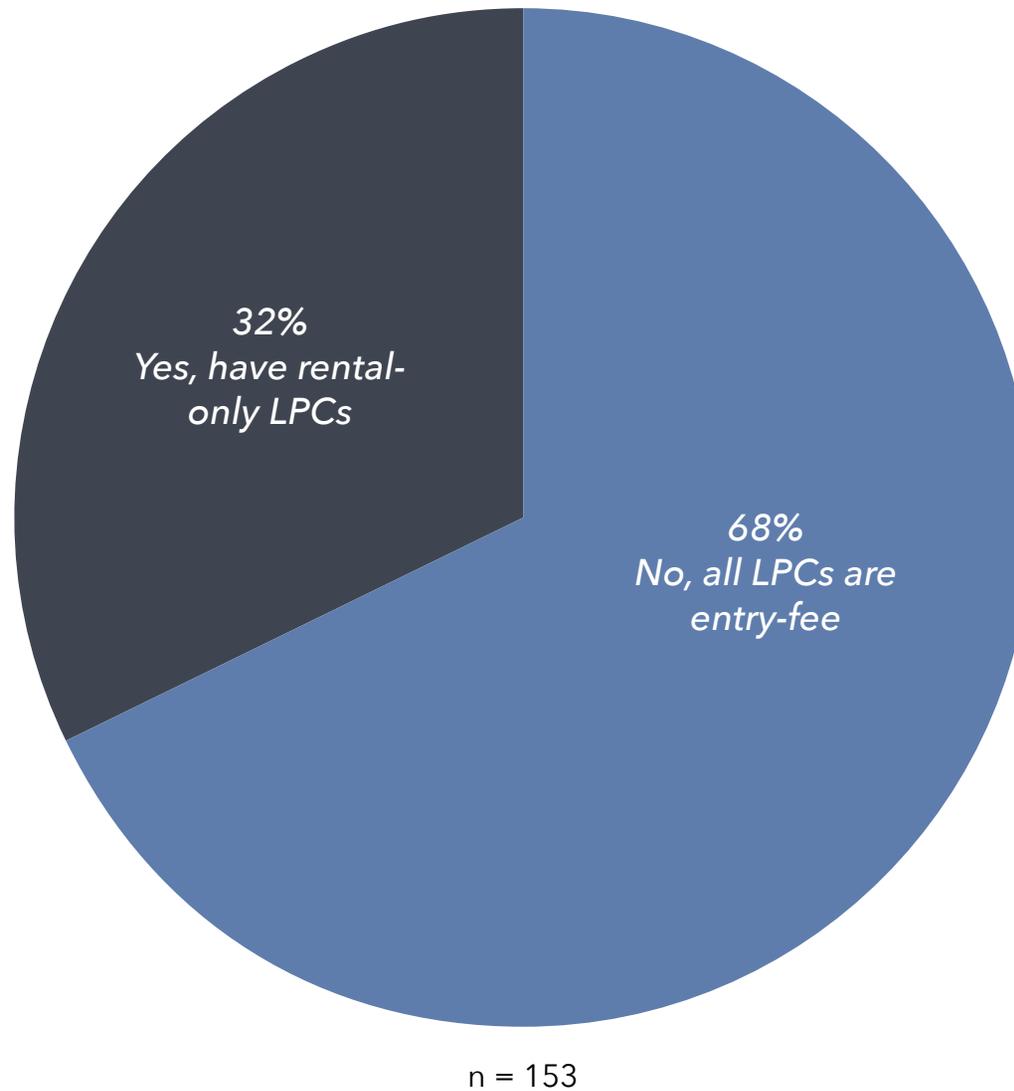
The LZ 200 analyses include an examination of the number of full-time equivalents (FTEs) each organization employs. An average of 858 FTEs were employed per organization throughout 2022. Note that the number of FTEs have decreased since the 2018 publication with the expansion to the largest 200 organizations as the size of the organizations get smaller the further above the 150 ranking.

Analysis for 2023 LZ 200 by Year		
Year	Average Number of FTEs	Average FTE/Resident
2010 avg FTE/resident n=97	1,263	0.57
2011 avg FTE/resident n=96	1,276	0.56
2012 avg FTE/resident n=90	1,333	0.56
2013* avg FTE/unit n=124	1,056	0.68
2014* avg FTE/unit n=123	1,093	0.58
2015* avg FTE/unit n=123	1,265	0.61
2016* avg FTE/unit n=129	1,063	0.62
2017** avg FTE/unit n=162	1,112	0.67
2018** avg FTE/unit n=161	1,103	0.63
2019** avg FTE/unit n=160	1,095	0.60
2020** avg FTE/unit n=144	882	0.54
2021** avg FTE/unit n=130	910	0.53
2022** avg FTE/unit n=142	858	0.53

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

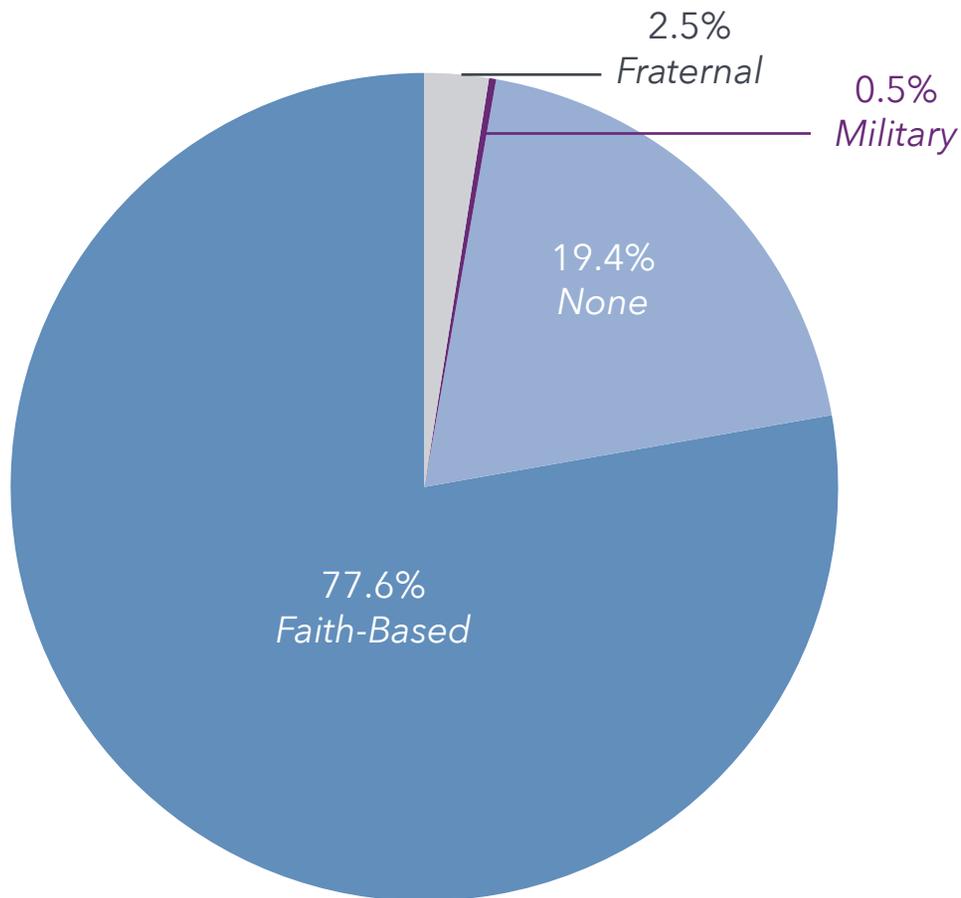
## Organizational Characteristics: Rental LPCs

### *Organizations That Have Fully Rental LPCs*



## Analysis of the Data: Affiliations

### *Affiliation by Total Number of Systems*

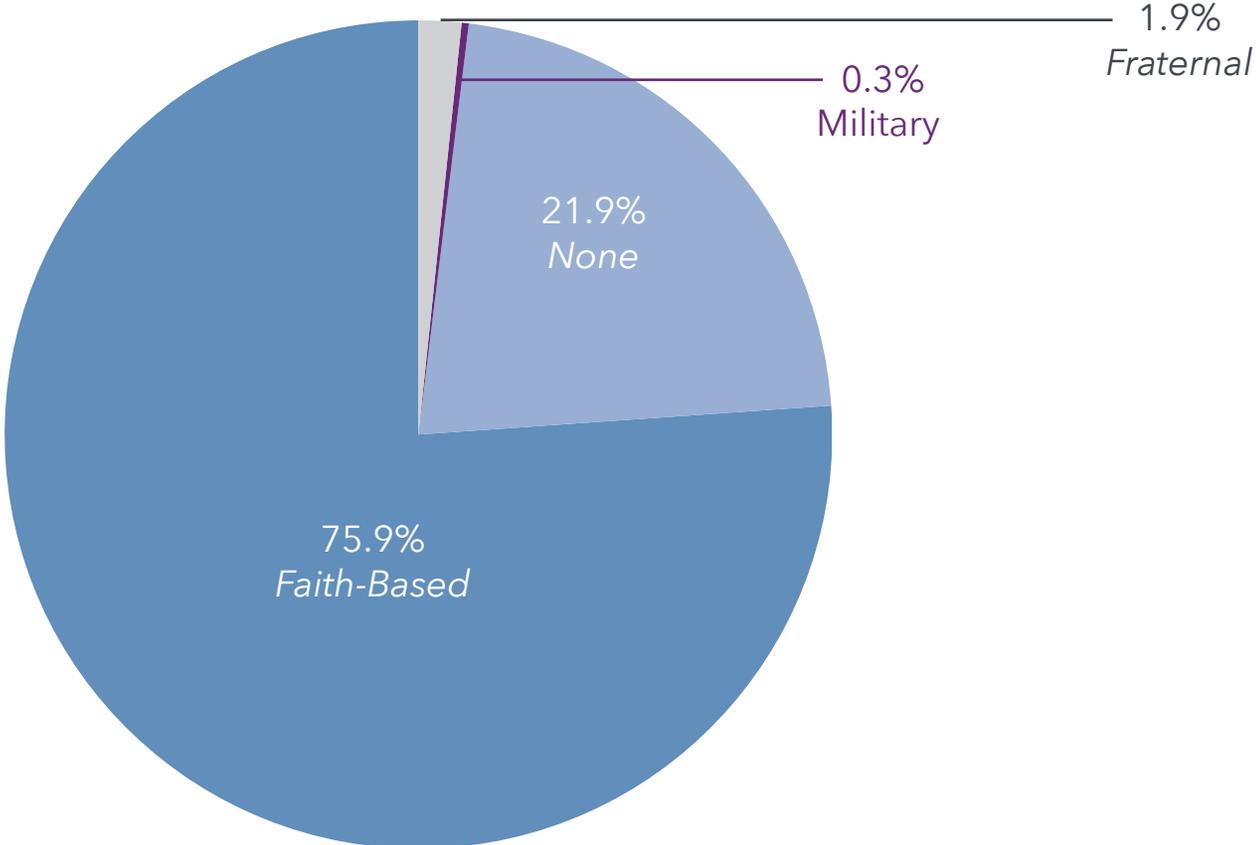


### *Affiliation*

More than seventy-five percent (75%) 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 50,000 units. Presbyterian affiliation follows with more than 41,500 units.

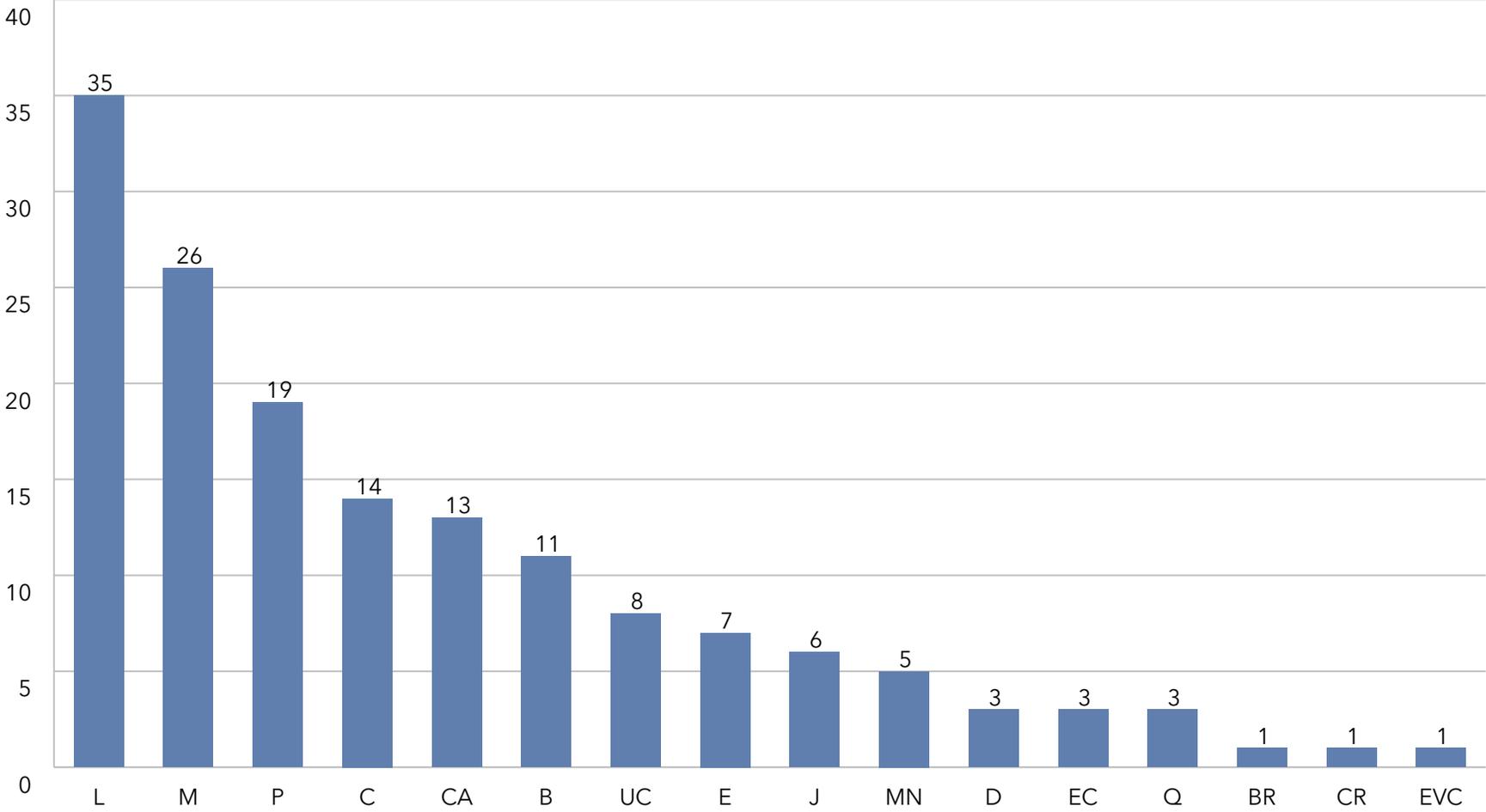
# Analysis of the Data: Affiliations

## Affiliation by Total Number of Units



# Analysis of the Data: Affiliations

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



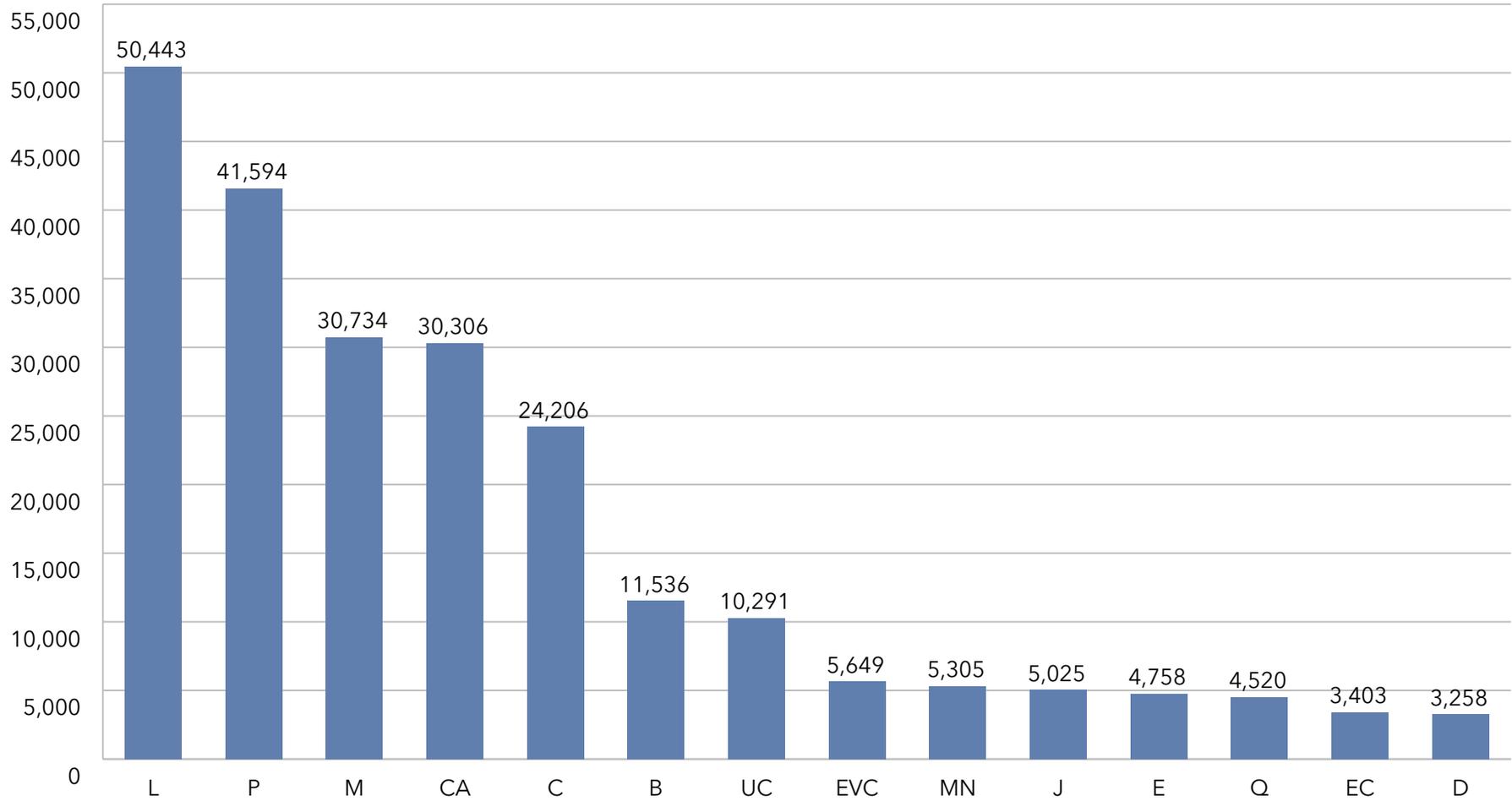
**KEY:**

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

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

# Analysis of the Data: Affiliations

## Faith-Based Affiliations, by Total Units



**KEY:**

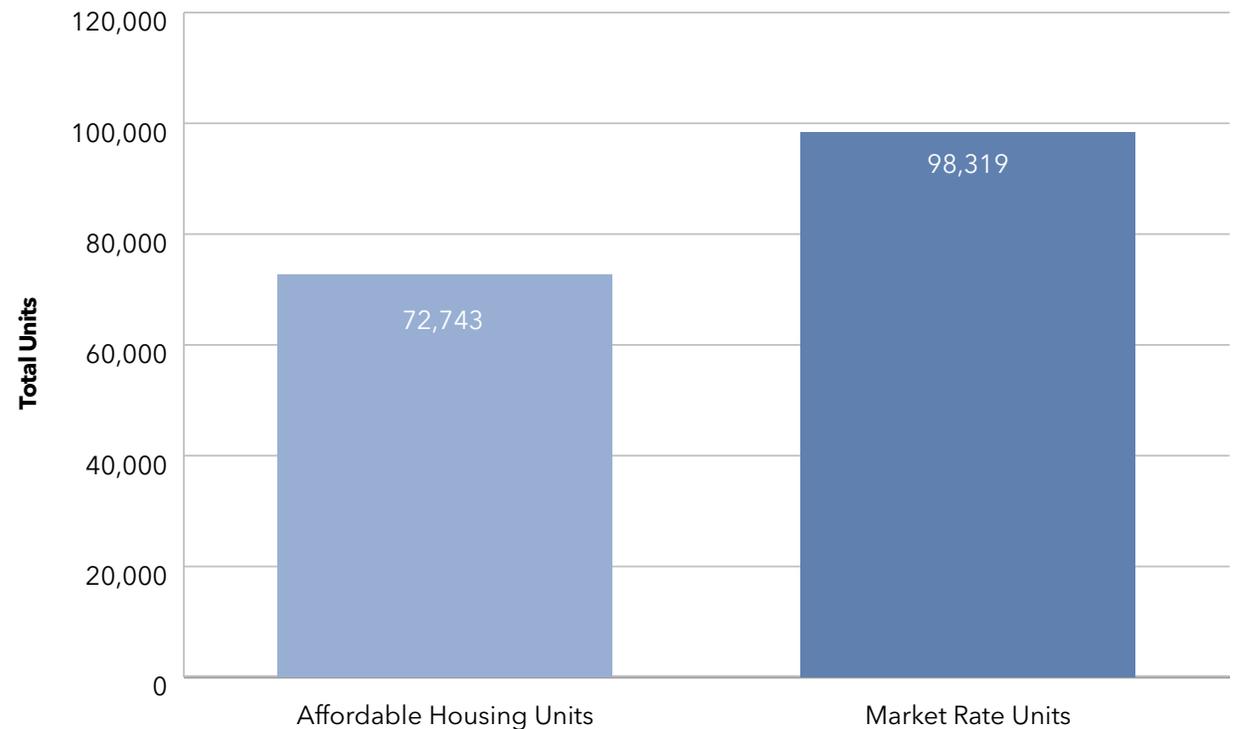
B	Baptist	E	Episcopal	L	Lutheran	P	Presbyterian
C	Christian	EC	Ecumenical	M	Methodist	Q	Quaker
CA	Catholic	EVC	Evangelical Covenant	MN	Mennonite	UC	United Church of Christ
D	Dutch Reformed	J	Jewish				

## Organizational Characteristics: Affordable Housing

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

#### *Affordable Housing*

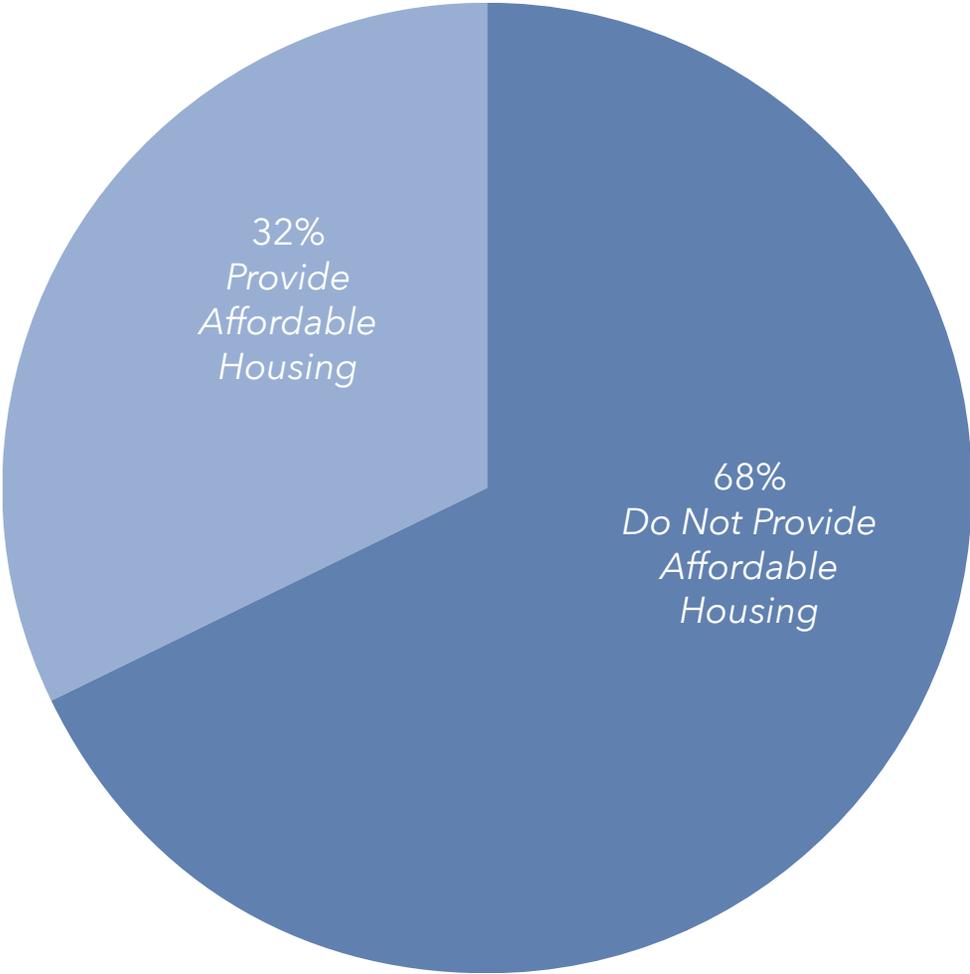
The ranking of the LZ 200 organizations by the number of affordable (non-market-rate & market rate) units is included with this research to show that several the LZ 200 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Section 4-15 detail these listings further. The data reveal that among the LZ 200, thirty-two percent (32%) have affordable housing units.



n = 63

# Organizational Characteristics: Affordable Housing

*Percentage Providing Affordable Housing*



n = 63

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

Chart 4-15c presents an aggregate ranking of unit types, market rate and market rate affordable housing. This type of ranking better reflects the size and scope of each organization that provides residential options for seniors of varying income levels. For example, National Church Residences is ranked as LZ 200 #34 (Primary Ranking) with 2,078 total market-rate units while the organization is ranked #1 with 22,985 total affordable housing units. By aggregating these two categories of seniors housing, the organization is the largest among the LZ 200 with 25,063 total units.



## Additional Listings: Multi-Site Senior Living Providers

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

2023 Combined MR & AFF Rank	2023 LZ200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	AFF
1	34	National Church Residences	OH	25,063	1,215	716	147	22,985
2	1	National Senior Communities	VA	21,959	19,140	1,807	1,012	0
3	25	Retirement Housing Foundation	CA	16,500	1,707	594	275	13,924
4	2	The Evangelical Lutheran Good Samaritan Society	SD	15,820	5,155	2,242	8,423	0
5	7	HumanGood	CA	11,364	3,580	1,141	1,096	5,547
6	3	Presbyterian Homes & Services	MN	9,935	5,307	2,867	1,472	289
7	4	Acts Retirement-Life Communities	PA	9,432	6,763	1,146	1,523	0
8	27	Transforming Age	WA	8,363	1,759	706	78	5,820
9	5	Ascension Living	MO	6,692	1,800	1,203	3,689	0
10	11	Westminster Retirement Communities of Florida	FL	6,633	2,905	553	781	2,394
11	6	Lifespace Communities, Inc.	IA	5,958	4,046	785	1,127	0
12	8	Covenant Living Communities & Services	IL	5,649	3,653	973	1,023	0
13	12	Front Porch Communities and Services	CA	5,148	3,023	477	723	925
14	9	Trinity Health Senior Communities	MI	5,136	1,942	1,165	2,029	0
15	10	Benedictine	MN	4,625	879	1,653	2,093	0
16	24	Springpoint Senior Living	NJ	4,380	1,726	378	491	1,785
17	15	Lutheran Senior Services	MO	3,961	1,741	731	974	515
18	13	Cassia	MN	3,874	138	2,144	1,386	206
19	47	United Church Homes, Inc.	OH	3,861	837	159	644	2,221
20	14	Asbury Communities, Inc.	MD	3,828	2,215	560	790	263
21	16	The Kendal Corporation	DE	3,380	2,329	616	435	0
22	17	Pacific Retirement Services	OR	3,253	2,536	373	344	0
23	20	Otterbein SeniorLife	OH	3,234	1,471	598	1,165	0
24	18	Presbyterian Senior Living	PA	3,124	1,655	594	875	0
25	19	Concordia Lutheran Ministries	PA	2,965	1,038	1,264	663	0

MR: Market-rate | AFF: Affordable Housing

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

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

2023 Combined MR & AFF Rank	2023 LZ200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	AFF
26	58	Presbyterian Villages of Michigan	MI	2,936	1,000	264	102	1,570
27	21	The Carmelite System, Inc.	NY	2,898	51	498	2,349	0
28	23	Ohio Living	OH	2,881	1,605	455	656	165
29	22	BHI Senior Living, Inc.	IN	2,808	1,248	1,011	549	0
30	33	Ecumen	MN	2,786	431	1,370	289	696
31	48	Presbyterian SeniorCare Network	PA	2,656	508	405	676	1,067
32	26	Masonic Villages of the Grand Lodge of PA	PA	2,553	1,631	256	666	0
33	28	Volunteers of America	VA	2,484	604	873	1,007	0
34	31	Christian Care Companies	AZ	2,396	1,687	409	68	232
35	176	Episcopal Retirement Services	OH	2,309	277	85	138	1,809
36	52	Hebrew SeniorLife	MA	2,308	654	115	773	766
37	37	Greencroft Communities	IN	2,219	676	581	610	352
38	29	Willow Valley Communities	PA	2,212	1,638	232	342	0
39	30	Bethesda Senior Living Communities	CO	2,171	513	1,658	0	0
40	42	Covenant Health	MA	2,124	0	364	1,332	428
41	32	Presbyterian Manors of Mid-America	KS	2,099	851	538	710	0
42	35	WesleyLife	IA	2,007	869	441	697	0
43	36	Homewood Retirement Centers, Inc.	MD	1,905	1,163	291	451	0
44	51	Methodist Retirement Communities	TX	1,868	798	457	294	319
45	38	Franciscan Communities, Inc.	IL	1,804	744	479	581	0
46	40	Lutheran Services Carolinas	NC	1,790	519	334	904	33
47	39	ArchCare	NY	1,782	0	59	1,723	0
48	41	Bethesda Health Group, Inc.	MO	1,701	761	78	862	0
49	43	Buckner Retirement Services	TX	1,688	1,018	344	326	0
50	44	Life Enriching Communities	OH	1,686	907	408	371	0

MR: Market-rate | AFF: Affordable Housing

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

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

2023 Combined MR & AFF Rank	2023 LZ200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	AFF
51	45	Loretto	NY	1,684	210	551	923	0
52	113	Christian Care Communities	KY	1,675	262	154	419	840
53	46	Christian Horizons	MO	1,646	355	312	979	0
54	49	Immanuel	NE	1,587	909	447	231	0
55	50	Eskaton	CA	1,580	442	652	486	0
56	64	Diakon	PA	1,571	625	197	414	335
57	60	Magnolia Manor, Inc.	GA	1,549	294	170	843	242
58	69	Phoebe Ministries	PA	1,535	370	275	534	356
59	53	Mississippi Methodist Senior Services, Inc.	MS	1,450	776	354	320	0
60	54	Lifespire of Virginia	VA	1,441	887	327	227	0
61	94	St. Andrew's Resources for Seniors System	MO	1,430	474	183	281	492
62	72	Brio Living Services fka UMRC and Porter Hills	MI	1,426	675	337	144	270
63	55	Baptist Village Communities	OK	1,415	933	257	225	0
64	56	Lutheran Life Communities	IL	1,402	408	310	684	0
65	57	Presbyterian Homes	IL	1,399	821	237	341	0
66	59	Masonicare	CT	1,326	651	309	366	0
67	116	Presbyterian Homes of Georgia, Inc.	GA	1,324	330	149	335	510
68	83	Brightspire fka The Presbyterian Homes	NC	1,320	701	133	189	297
69	96	Methodist Homes of Alabama & Northwest Florida	AL	1,309	39	338	545	387
70	61	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	0
71	68	SpiriTrust Lutheran	PA	1,294	557	286	344	107
72	74	Legacy Lifecare	MA	1,287	0	361	780	146
73	76	Providence Life Services	IL	1,281	738	245	137	161
74	82	Lutheran SeniorLife	PA	1,270	519	231	303	217
75	62	Heritage Ministries	NY	1,268	363	221	684	0

MR: Market-rate | AFF: Affordable Housing

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

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

2023 Combined MR & AFF Rank	2023 LZ200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	AFF
76	100	Givens Communities	NC	1,266	751	43	110	362
77	63	National Lutheran Communities and Services	MD	1,255	697	247	311	0
78	65	Wesley Enhanced Living	PA	1,221	634	227	360	0
79	66	American Baptist Homes of the Midwest	MN	1,220	359	272	589	0
80	67	Holland Home	MI	1,219	757	303	159	0
81	93	EveryAge	NC	1,211	541	90	328	252
82	105	United Methodist Communities	NJ	1,182	88	546	248	300
83	70	Wesley	WA	1,163	765	214	184	0
84	71	Friendship Village	MO	1,157	785	138	234	0
85	73	Baruch Senior Ministries	MI	1,156	6	1,150	0	0
86	89	Felician Services, Inc.	IL	1,155	172	257	545	181
87	75	United Methodist Homes	NY	1,129	436	267	426	0
88	79	Eventide	MN	1,123	65	460	552	46
89	193	Genacross Lutheran Services	OH	1,123	107	119	200	697
90	77	Sequoia Living, Inc.	CA	1,116	844	136	136	0
91	78	Ingleside	MD	1,112	832	157	123	0
92	80	Friendship Senior Options	IL	1,075	679	184	212	0
93	81	Walker Methodist	MN	1,069	328	481	260	0
94	127	Christian Health	NJ	1,046	353	95	298	300
95	117	Illuminus fka Marquardt Village, Inc.	WI	1,024	287	283	240	214
96	84	Lutheran Homes of South Carolina Inc.	SC	1,009	417	249	343	0
97	88	UMRH, Inc.	NC	1,000	640	140	196	24
98	85	Goodwin Living fka Goodwin House Incorporated	VA	996	704	119	173	0
99	86	Presbyterian Communities of South Carolina	SC	996	423	306	267	0
100	87	Liberty Lutheran Services	PA	978	443	318	217	0

MR: Market-rate | AFF: Affordable Housing

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

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

2023 Combined MR & AFF Rank	2023 LZ200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	AFF
101	90	Pinnacle Living	VA	973	544	263	166	0
102	91	Haverland Carter Lifestyle Group	NM	971	451	390	130	0
103	92	The RiverWoods Group	NH	967	681	242	44	0
104	103	Masonic Homes of Ky, Inc.	KY	962	449	181	257	75
105	97	Christian Living Communities	CO	959	421	306	192	40
106	95	Blue Skies of Texas	TX	937	728	129	80	0
107	114	Living Branches	PA	934	459	232	143	100
108	98	St John's Home	NY	916	403	38	475	0
109	106	Landis Communities	PA	914	610	155	103	46
110	99	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	0
111	101	Lutheran Social Ministries of MD	MD	893	700	60	133	0
112	102	Menno Haven, Inc.	PA	891	508	223	160	0
113	104	Saint Therese	MN	886	438	160	288	0
114	107	Sun Health Services	AZ	866	637	114	115	0
115	108	Alliance Health & Human Services	MA	861	0	0	861	0
116	200	Jewish Senior Life of Metropolitan Detroit	MI	854	290	104	0	460
117	110	Garden Spot Communities	PA	850	621	105	119	5
118	109	Mather	IL	848	712	59	77	0
119	111	The Moorings, Incorporated	FL	838	625	107	106	0
120	112	The New Jewish Home	NY	838	24	0	814	0
121	131	Simpson Senior Services	PA	829	454	170	102	103
122	126	Ebenezer Society	MN	827	0	443	310	74
123	115	Luthercare	PA	823	484	128	211	0
124	118	Wesley Willows	IL	801	547	163	91	0
125	119	Westminster-Canterbury on Chesapeake Bay	VA	799	611	80	108	0

MR: Market-rate | AFF: Affordable Housing

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

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

2023 Combined MR & AFF Rank	2023 LZ200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	AFF
126	134	Episcopal SeniorLife Communities	NY	795	334	193	182	86
127	120	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	0
128	121	Sunnyside Communities	VA	773	484	155	134	0
129	122	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	0
130	125	Samaritas	MI	768	293	120	348	7
131	123	Grace Inspired Ministries	PA	767	451	151	165	0
132	124	United Church of Christ Homes	PA	766	267	124	375	0
133	128	Benevolent Corporation Cedar Community	WI	737	437	225	75	0
134	129	Futura Age fka eliseo and Foss Home	WA	733	221	114	398	0
135	130	Vista Prairie Communities	MN	729	100	629	0	0
136	150	Episcopal Communities & Services	CA	727	443	109	39	136
137	132	Bethany Lutheran Homes Inc.	WI	726	282	321	123	0
138	133	Emerald Communities	WA	725	527	107	91	0
139	135	Morningside Ministries	TX	708	434	134	140	0
140	136	United Methodist Memorial Home	IN	699	188	255	256	0
141	137	Brazos Presbyterian Homes Inc.	TX	697	503	91	103	0
142	138	Sunset Senior Communities	MI	696	384	312	0	0
143	139	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	0
144	140	Ohio Masonic Home	OH	676	302	242	132	0
145	141	Vincentian Collaborative Services	PA	675	66	82	527	0
146	142	Ascentria Care Alliance	MA	673	0	57	616	0
147	154	Baptist Senior Services	PA	672	426	84	63	99
148	143	Messiah Lifeways	PA	660	362	163	135	0
149	144	Well•Spring Group	NC	649	461	94	94	0
150	163	Bluestem Communities	KS	646	320	63	158	105

MR: Market-rate | AFF: Affordable Housing

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

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

2023 Combined MR & AFF Rank	2023 LZ200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	AFF
151	145	Community Wellness Partners, Inc.	NY	640	124	0	516	0
152	146	Smith Senior Living	IL	636	322	144	170	0
153	147	Wellspring Lutheran Services	MI	635	125	169	341	0
154	148	ThriveMore fka Baptist Retirement Homes of North Carolina, Inc.	NC	608	267	140	201	0
155	185	Beechwood Continuing Care, Inc.	NY	606	184	0	272	150
156	149	Friends Homes, Inc.	NC	603	394	100	109	0
157	161	St. John's United	MT	596	204	167	175	50
158	151	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	0
159	170	Rockwood Retirement Communities	WA	583	341	135	45	62
160	152	Retirement Companies of America	TN	580	396	94	90	0
161	153	Lutheran Life Villages	IN	577	183	69	325	0
162	155	Havenwood Heritage Heights	NH	567	367	63	137	0
163	156	Bethel	NY	563	170	130	263	0
164	157	The Legacy Senior Communities	TX	558	298	146	114	0
165	158	Friendly Senior Living	NY	555	298	57	200	0
166	159	Sholom Community Alliance	MN	552	153	142	257	0
167	160	FellowshipLIFE fka Fellowship Senior Living	NJ	550	331	152	67	0
168	162	Church Homes, Inc.	CT	542	319	24	199	0
169	164	Cardinal Ritter Senior Services	MO	541	205	90	246	0
170	165	Medford Leas	NJ	537	394	119	24	0
171	166	EHM Senior Solutions	MI	529	112	70	347	0
172	167	The Lutheran Home Association	WI	525	161	157	207	0
173	169	Redstone Presbyterian SeniorCare	PA	524	304	143	77	0
174	168	CRISTA Senior Living	WA	524	374	150	0	0
175	171	Christian Village Communities	OH	521	189	182	150	0

MR: Market-rate | AFF: Affordable Housing

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

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

2023 Combined MR & AFF Rank	2023 LZ200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	AFF
176	172	Willow Brook Christian Communities	OH	520	267	169	84	0
177	173	LindenGrove Communities	WI	511	0	258	253	0
178	174	United Methodist Homes, Inc.	CT	507	90	297	120	0
179	175	Eliza Jennings Senior Care Network	OH	506	176	114	216	0
180	177	Judson Services, Inc.	OH	500	227	135	138	0
181	178	Knute Nelson	MN	494	211	200	83	0
182	179	St. Edward Home	OH	493	177	235	81	0
183	191	Baptist Life Communities	KY	486	150	60	218	58
184	180	St. Paul's Senior Services	CA	482	134	289	59	0
185	181	Bethany St. Joseph Corporation	WI	473	135	158	180	0
186	190	Bethesda	MN	470	89	93	248	40
187	182	Deaconess Abundant Life Communities	MA	469	283	144	42	0
188	183	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	0
189	184	Good Shepherd Communities	NY	457	192	99	166	0
190	186	The Lutheran Home Inc.	WI	455	170	98	187	0
191	187	Loomis Communities Inc.	MA	454	357	55	42	0
192	188	Michigan Masonic Homes	MI	442	38	155	249	0
193	189	Allegheny Lutheran Social Ministries	PA	431	183	96	152	0
194	192	Community First Solutions	OH	426	197	101	128	0
195	194	Convivial Life Inc.	FL	424	243	181	0	0
196	195	Skaalen Retirement Services	WI	421	229	101	91	0
197	196	Wesbury	PA	418	117	91	210	0
198	197	A.G. Rhodes	GA	413	0	0	413	0
199	198	Parker	NJ	407	0	60	347	0
200	199	South Carolina Baptist Ministry of Aging (SCBMA)	SC	398	139	83	176	0

MR: Market-rate | AFF: Affordable Housing



## Organizational Characteristics: Managed Units & Communities

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

LZ 200 Managed Rank	2023 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
1	126	Ebenezer Society	MN	8,716	101
2	34	National Church Residences	OH	3,517	55
3	50	Eskaton	CA	2,074	30
4	7	HumanGood	CA	2,030	29
5	47	United Church Homes, Inc.	OH	1,987	21
6	12	Front Porch Communities and Services	CA	1,605	23
7	33	Ecumen	MN	977	19
8	117	Illuminus fka Marquardt Village, Inc.	WI	833	9
9	66	American Baptist Homes of the Midwest	MN	809	0
10	13	Cassia	MN	805	12
11	27	Transforming Age	WA	791	10
12	55	Baptist Village Communities	OK	776	4
13	48	Presbyterian SeniorCare Network	PA	707	11
14	83	Brightspire fka The Presbyterian Homes	NC	597	1
15	59	Masonicare	CT	492	5
16	30	Bethesda Senior Living Communities	CO	489	4
17	97	Christian Living Communities	CO	476	3
18	160	FellowshipLIFE fka Fellowship Senior Living	NJ	471	2
19	58	Presbyterian Villages of Michigan	MI	462	6
20	38	Franciscan Communities, Inc.	IL	412	3
21	94	St. Andrew's Resources for Seniors System	MO	360	2
22	22	BHI Senior Living, Inc.	IN	293	4
23	41	Bethesda Health Group, Inc.	MO	266	3
24	178	Knute Nelson	MN	257	8
25	3	Presbyterian Homes & Services	MN	235	2

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

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

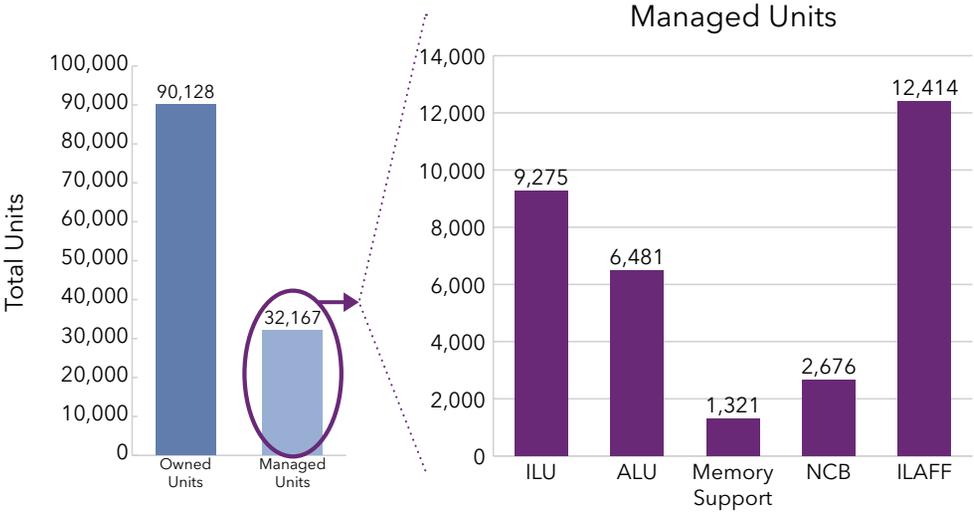
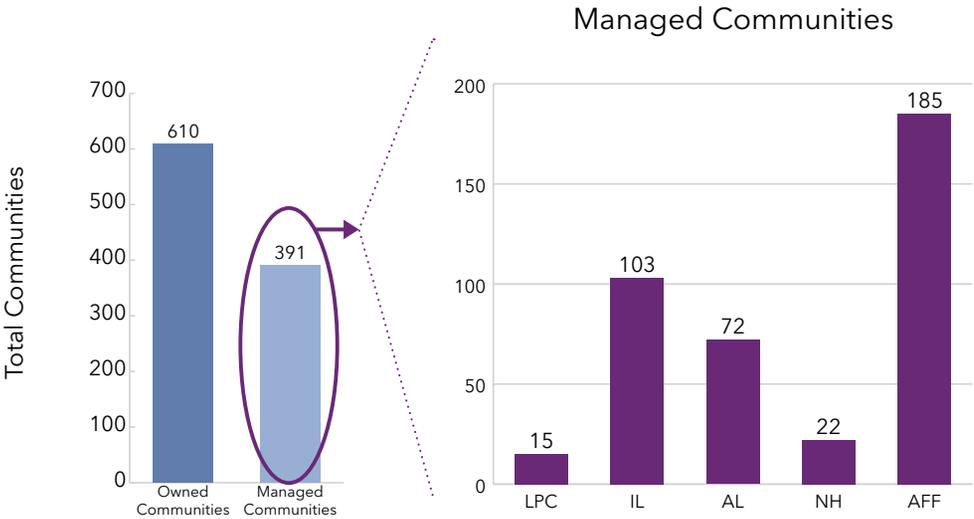
### Providers that Manage, Ranked by Managed-Only Units

LZ 200 Managed Rank	2023 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
26	15	Lutheran Senior Services	MO	208	0
27	125	Samaritas	MI	195	6
28	72	Brio Living Services fka UMRC and Porter Hills	MI	178	0
29	85	Goodwin Living fka Goodwin House Incorporated	VA	161	1
30	161	St. John's United	MT	160	2
31	82	Lutheran SeniorLife	PA	158	2
32	181	Bethany St. Joseph Corporation	WI	126	3
33	154	Baptist Senior Services	PA	109	1
34	99	St. Ann's of Greater Rochester, Inc.	NY	107	1
35	73	Baruch Senior Ministries	MI	83	2
36	35	WesleyLife	IA	55	1
37	25	Retirement Housing Foundation	CA	50	1
38	169	Redstone Presbyterian SeniorCare	PA	50	1
39	24	Springpoint Senior Living	NJ	40	1
40	108	Alliance Health & Human Services	MA	32	1
41	176	Episcopal Retirement Services	OH	18	1

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

# Organizational Characteristics: Managed Units & Communities

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



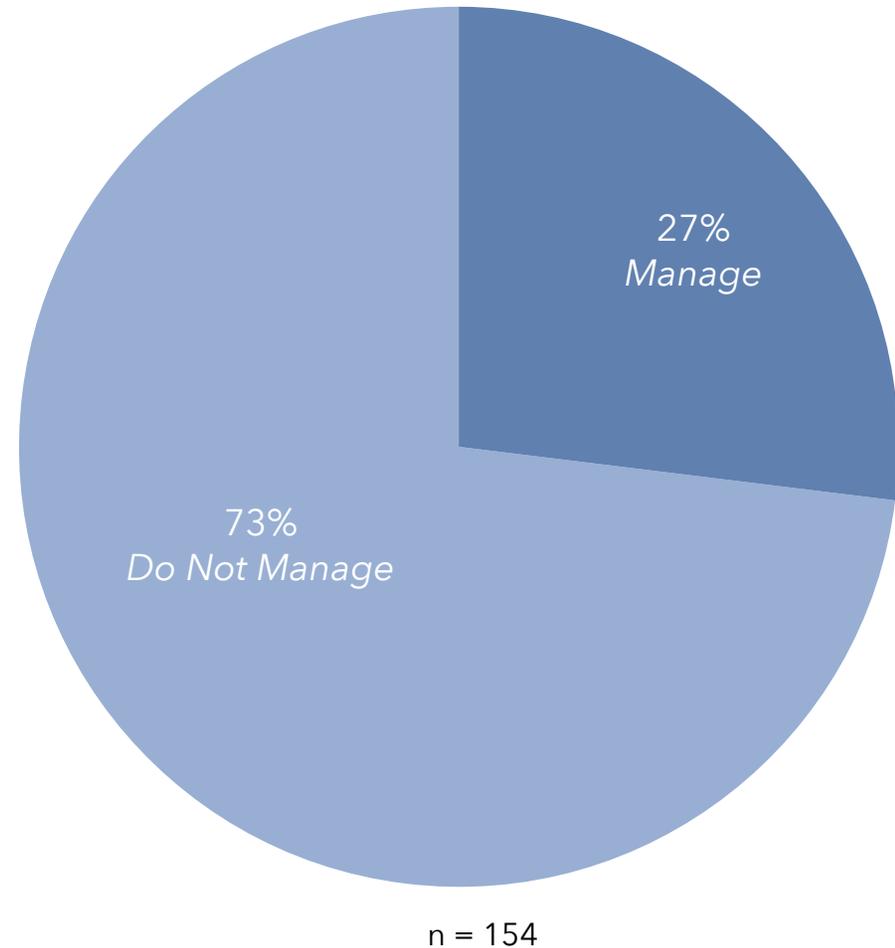
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## Organizational Characteristics: Managed Units & Communities

### *Percentage that Manage*

#### *Managed Units and Communities*

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



# Organizational Characteristics: Managed Units & Communities

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

2023 Combined MR & MGD Rank	2023 LZ 200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	MGD
1	1	National Senior Communities	VA	21,959	19,140	1,807	1,012	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	15,820	5,155	2,242	8,423	0
3	3	Presbyterian Homes & Services	MN	9,881	5,307	2,867	1,472	235
4	126	Ebenezer Society	MN	9,469	0	443	310	8716
5	4	Acts Retirement-Life Communities	PA	9,432	6,763	1,146	1,523	0
6	7	HumanGood	CA	7,847	3,580	1,141	1,096	2030
7	5	Ascension Living	MO	6,692	1,800	1,203	3,689	0
8	6	Lifespace Communities, Inc.	IA	5,958	4,046	785	1,127	0
9	12	Front Porch Communities and Services	CA	5,828	3,023	477	723	1605
10	8	Covenant Living Communities & Services	IL	5,649	3,653	973	1,023	0
11	34	National Church Residences	OH	5,595	1,215	716	147	3517
12	9	Trinity Health Senior Communities	MI	5,136	1,942	1,165	2,029	0
13	10	Benedictine	MN	4,625	879	1,653	2,093	0
14	13	Cassia	MN	4,473	138	2,144	1,386	805
15	11	Westminster Retirement Communities of Florida	FL	4,239	2,905	553	781	0
16	15	Lutheran Senior Services	MO	3,654	1,741	731	974	208
17	50	Eskaton	CA	3,654	442	652	486	2074
18	47	United Church Homes, Inc.	OH	3,627	837	159	644	1987
19	14	Asbury Communities, Inc.	MD	3,565	2,215	560	790	0
20	16	The Kendal Corporation	DE	3,380	2,329	616	435	0
21	27	Transforming Age	WA	3,334	1,759	706	78	791
22	17	Pacific Retirement Services	OR	3,253	2,536	373	344	0
23	20	Otterbein SeniorLife	OH	3,234	1,471	598	1,165	0
24	18	Presbyterian Senior Living	PA	3,124	1,655	594	875	0
25	22	BHI Senior Living, Inc.	IN	3,101	1,248	1,011	549	293

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

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

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

2023 Combined MR & MGD Rank	2023 LZ 200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	MGD
26	33	Ecumen	MN	3,067	431	1,370	289	977
27	19	Concordia Lutheran Ministries	PA	2,965	1,038	1,264	663	0
28	21	The Carmelite System, Inc.	NY	2,898	51	498	2,349	0
29	23	Ohio Living	OH	2,716	1,605	455	656	0
30	30	Bethesda Senior Living Communities	CO	2,660	513	1,658	0	489
31	24	Springpoint Senior Living	NJ	2,635	1,726	378	491	40
32	25	Retirement Housing Foundation	CA	2,626	1,707	594	275	50
33	26	Masonic Villages of the Grand Lodge of PA	PA	2,553	1,631	256	666	0
34	28	Volunteers of America	VA	2,484	604	873	1,007	0
35	48	Presbyterian SeniorCare Network	PA	2,296	508	405	676	707
36	38	Franciscan Communities, Inc.	IL	2,216	744	479	581	412
37	29	Willow Valley Communities	PA	2,212	1,638	232	342	0
38	55	Baptist Village Communities	OK	2,191	933	257	225	776
39	31	Christian Care Companies	AZ	2,164	1,687	409	68	0
40	32	Presbyterian Manors of Mid-America	KS	2,099	851	538	710	0
41	35	WesleyLife	IA	2,062	869	441	697	55
42	66	American Baptist Homes of the Midwest	MN	2,029	359	272	589	809
43	41	Bethesda Health Group, Inc.	MO	1,967	761	78	862	266
44	36	Homewood Retirement Centers, Inc.	MD	1,905	1,163	291	451	0
45	37	Greencroft Communities	IN	1,867	676	581	610	0
46	58	Presbyterian Villages of Michigan	MI	1,828	1,000	264	102	462
47	59	Masonicare	CT	1,818	651	309	366	492
48	39	ArchCare	NY	1,782	0	59	1,723	0
49	40	Lutheran Services Carolinas	NC	1,757	519	334	904	0
50	42	Covenant Health	MA	1,696	0	364	1,332	0

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

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

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

2023 Combined MR & MGD Rank	2023 LZ 200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	MGD
51	43	Buckner Retirement Services	TX	1,688	1,018	344	326	0
52	44	Life Enriching Communities	OH	1,686	907	408	371	0
53	45	Loretto	NY	1,684	210	551	923	0
54	46	Christian Horizons	MO	1,646	355	312	979	0
55	117	Illuminus fka Marquardt Village, Inc.	WI	1,643	287	283	240	833
56	83	Brightspire fka The Presbyterian Homes	NC	1,620	701	133	189	597
57	49	Immanuel	NE	1,587	909	447	231	0
58	51	Methodist Retirement Communities	TX	1,549	798	457	294	0
59	52	Hebrew SeniorLife	MA	1,542	654	115	773	0
60	53	Mississippi Methodist Senior Services, Inc.	MS	1,450	776	354	320	0
61	54	Lifespire of Virginia	VA	1,441	887	327	227	0
62	56	Lutheran Life Communities	IL	1,402	408	310	684	0
63	57	Presbyterian Homes	IL	1,399	821	237	341	0
64	97	Christian Living Communities	CO	1,395	421	306	192	476
65	72	Brio Living Services fka UMRC and Porter Hills	MI	1,334	675	337	144	178
66	60	Magnolia Manor, Inc.	GA	1,307	294	170	843	0
67	61	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	0
68	94	St. Andrew's Resources for Seniors System	MO	1,298	474	183	281	360
69	62	Heritage Ministries	NY	1,268	363	221	684	0
70	63	National Lutheran Communities and Services	MD	1,255	697	247	311	0
71	73	Baruch Senior Ministries	MI	1,239	6	1,150	0	83
72	64	Diakon	PA	1,236	625	197	414	0
73	65	Wesley Enhanced Living	PA	1,221	634	227	360	0
74	67	Holland Home	MI	1,219	757	303	159	0
75	82	Lutheran SeniorLife	PA	1,211	519	231	303	158

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

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

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

2023 Combined MR & MGD Rank	2023 LZ 200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	MGD
76	68	SpiriTrust Lutheran	PA	1,187	557	286	344	0
77	69	Phoebe Ministries	PA	1,179	370	275	534	0
78	70	Wesley	WA	1,163	765	214	184	0
79	71	Friendship Village	MO	1,157	785	138	234	0
80	85	Goodwin Living fka Goodwin House Incorporated	VA	1,157	704	119	173	161
81	74	Legacy Lifecare	MA	1,141	0	361	780	0
82	75	United Methodist Homes	NY	1,129	436	267	426	0
83	76	Providence Life Services	IL	1,120	738	245	137	0
84	77	Sequoia Living, Inc.	CA	1,116	844	136	136	0
85	78	Ingleside	MD	1,112	832	157	123	0
86	79	Eventide	MN	1,077	65	460	552	0
87	80	Friendship Senior Options	IL	1,075	679	184	212	0
88	81	Walker Methodist	MN	1,069	328	481	260	0
89	160	FellowshipLIFE fka Fellowship Senior Living	NJ	1,021	331	152	67	471
90	99	St. Ann's of Greater Rochester, Inc.	NY	1,020	296	75	542	107
91	84	Lutheran Homes of South Carolina Inc.	SC	1,009	417	249	343	0
92	86	Presbyterian Communities of South Carolina	SC	996	423	306	267	0
93	87	Liberty Lutheran Services	PA	978	443	318	217	0
94	88	UMRH, Inc.	NC	976	640	140	196	0
95	89	Felician Services, Inc.	IL	974	172	257	545	0
96	90	Pinnacle Living	VA	973	544	263	166	0
97	91	Haverland Carter Lifestyle Group	NM	971	451	390	130	0
98	92	The RiverWoods Group	NH	967	681	242	44	0
99	93	EveryAge	NC	959	541	90	328	0
100	125	Samaritas	MI	956	293	120	348	195

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

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

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

2023 Combined MR & MGD Rank	2023 LZ 200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	MGD
101	95	Blue Skies of Texas	TX	937	728	129	80	0
102	96	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	0
103	98	St John's Home	NY	916	403	38	475	0
104	100	Givens Communities	NC	904	751	43	110	0
105	101	Lutheran Social Ministries of MD	MD	893	700	60	133	0
106	108	Alliance Health & Human Services	MA	893	0	0	861	32
107	102	Menno Haven, Inc.	PA	891	508	223	160	0
108	103	Masonic Homes of Ky, Inc.	KY	887	449	181	257	0
109	104	Saint Therese	MN	886	438	160	288	0
110	105	United Methodist Communities	NJ	882	88	546	248	0
111	106	Landis Communities	PA	868	610	155	103	0
112	107	Sun Health Services	AZ	866	637	114	115	0
113	109	Mather	IL	848	712	59	77	0
114	110	Garden Spot Communities	PA	845	621	105	119	0
115	111	The Moorings, Incorporated	FL	838	625	107	106	0
116	112	The New Jewish Home	NY	838	24	0	814	0
117	113	Christian Care Communities	KY	835	262	154	419	0
118	114	Living Branches	PA	834	459	232	143	0
119	115	LutherCare	PA	823	484	128	211	0
120	116	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	0
121	118	Wesley Willows	IL	801	547	163	91	0
122	119	Westminster-Canterbury on Chesapeake Bay	VA	799	611	80	108	0
123	120	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	0
124	121	Sunnyside Communities	VA	773	484	155	134	0
125	122	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	0

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

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

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

2023 Combined MR & MGD Rank	2023 LZ 200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	MGD
126	123	Grace Inspired Ministries	PA	767	451	151	165	0
127	124	United Church of Christ Homes	PA	766	267	124	375	0
128	178	Knute Nelson	MN	751	211	200	83	257
129	127	Christian Health	NJ	746	353	95	298	0
130	128	Benevolent Corporation Cedar Community	WI	737	437	225	75	0
131	129	Futura Age fka eliseo and Foss Home	WA	733	221	114	398	0
132	130	Vista Prairie Communities	MN	729	100	629	0	0
133	131	Simpson Senior Services	PA	726	454	170	102	0
134	132	Bethany Lutheran Homes Inc.	WI	726	282	321	123	0
135	133	Emerald Communities	WA	725	527	107	91	0
136	134	Episcopal SeniorLife Communities	NY	709	334	193	182	0
137	135	Morningside Ministries	TX	708	434	134	140	0
138	161	St. John's United	MT	706	204	167	175	160
139	136	United Methodist Memorial Home	IN	699	188	255	256	0
140	137	Brazos Presbyterian Homes Inc.	TX	697	503	91	103	0
141	138	Sunset Senior Communities	MI	696	384	312	0	0
142	154	Baptist Senior Services	PA	682	426	84	63	109
143	139	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	0
144	140	Ohio Masonic Home	OH	676	302	242	132	0
145	141	Vincentian Collaborative Services	PA	675	66	82	527	0
146	142	Ascentria Care Alliance	MA	673	0	57	616	0
147	143	Messiah Lifeways	PA	660	362	163	135	0
148	144	Well•Spring Group	NC	649	461	94	94	0
149	145	Community Wellness Partners, Inc.	NY	640	124	0	516	0
150	146	Smith Senior Living	IL	636	322	144	170	0

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

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

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

2023 Combined MR & MGD Rank	2023 LZ 200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	MGD
151	147	Wellspring Lutheran Services	MI	635	125	169	341	0
152	148	ThriveMore fka Baptist Retirement Homes of North Carolina, Inc.	NC	608	267	140	201	0
153	149	Friends Homes, Inc.	NC	603	394	100	109	0
154	181	Bethany St. Joseph Corporation	WI	599	135	158	180	126
155	150	Episcopal Communities & Services	CA	591	443	109	39	0
156	151	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	0
157	152	Retirement Companies of America	TN	580	396	94	90	0
158	153	Lutheran Life Villages	IN	577	183	69	325	0
159	169	Redstone Presbyterian SeniorCare	PA	574	304	143	77	50
160	155	Havenwood Heritage Heights	NH	567	367	63	137	0
161	156	Bethel	NY	563	170	130	263	0
162	157	The Legacy Senior Communities	TX	558	298	146	114	0
163	158	Friendly Senior Living	NY	555	298	57	200	0
164	159	Sholom Community Alliance	MN	552	153	142	257	0
165	162	Church Homes, Inc.	CT	542	319	24	199	0
166	163	Bluestem Communities	KS	541	320	63	158	0
167	164	Cardinal Ritter Senior Services	MO	541	205	90	246	0
168	165	Medford Leas	NJ	537	394	119	24	0
169	166	EHM Senior Solutions	MI	529	112	70	347	0
170	167	The Lutheran Home Association	WI	525	161	157	207	0
171	168	CRISTA Senior Living	WA	524	374	150	0	0
172	170	Rockwood Retirement Communities	WA	521	341	135	45	0
173	171	Christian Village Communities	OH	521	189	182	150	0
174	172	Willow Brook Christian Communities	OH	520	267	169	84	0
175	176	Episcopal Retirement Services	OH	518	277	85	138	18

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

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

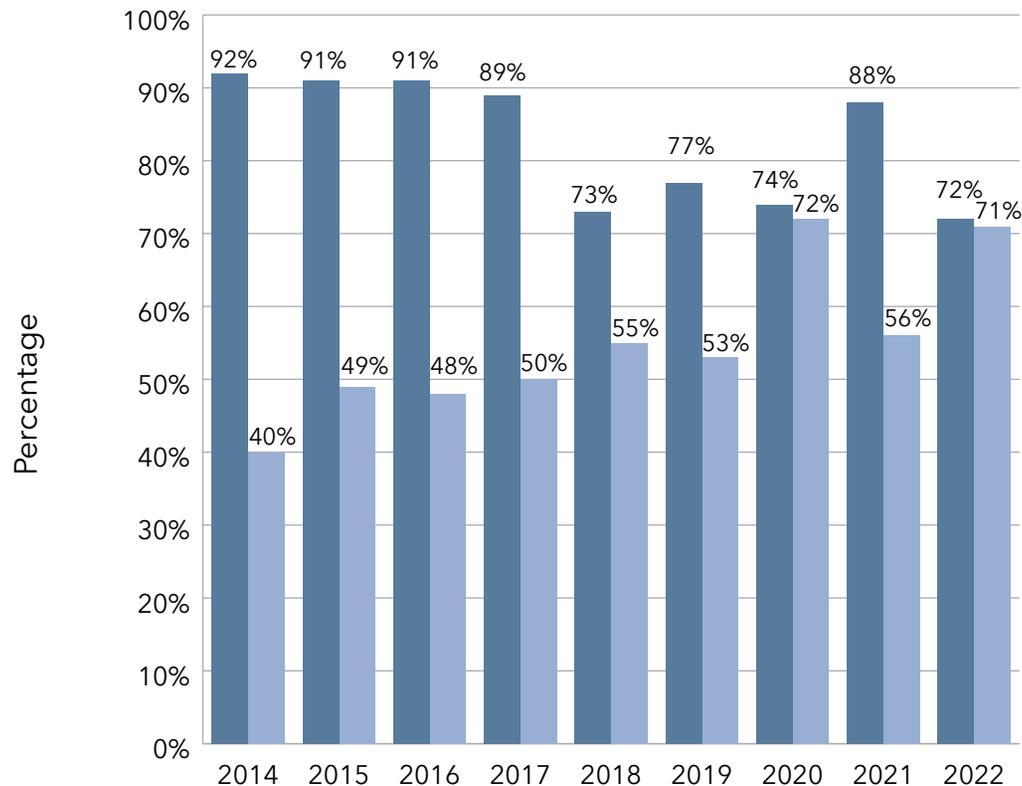
### Providers that Manage, Ranked by Market Rate & Managed Units

2023 Combined MR & MGD Rank	2023 LZ 200 Rank	System Name	State	Units (as of 12/31/22)				
				Total	ILU	ALU	NCB	MGD
176	173	LindenGrove Communities	WI	511	0	258	253	0
177	174	United Methodist Homes, Inc.	CT	507	90	297	120	0
178	175	Eliza Jennings Senior Care Network	OH	506	176	114	216	0
179	177	Judson Services, Inc.	OH	500	227	135	138	0
180	179	St. Edward Home	OH	493	177	235	81	0
181	180	St. Paul's Senior Services	CA	482	134	289	59	0
182	182	Deaconess Abundant Life Communities	MA	469	283	144	42	0
183	183	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	0
184	184	Good Shepherd Communities	NY	457	192	99	166	0
185	185	Beechwood Continuing Care, Inc.	NY	456	184	0	272	0
186	186	The Lutheran Home Inc.	WI	455	170	98	187	0
187	187	Loomis Communities Inc.	MA	454	357	55	42	0
188	188	Michigan Masonic Homes	MI	442	38	155	249	0
189	189	Allegheny Lutheran Social Ministries	PA	431	183	96	152	0
190	190	Bethesda	MN	430	89	93	248	0
191	191	Baptist Life Communities	KY	428	150	60	218	0
192	192	Community First Solutions	OH	426	197	101	128	0
193	193	Genacross Lutheran Services	OH	426	107	119	200	0
194	194	Convivial Life Inc.	FL	424	243	181	0	0
195	195	Skaalen Retirement Services	WI	421	229	101	91	0
196	196	Wesbury	PA	418	117	91	210	0
197	197	A.G. Rhodes	GA	413	0	0	413	0
198	198	Parker	NJ	407	0	60	347	0
199	199	South Carolina Baptist Ministry of Aging (SCBMA)	SC	398	139	83	176	0
200	200	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	0

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

## Organizational Characteristics: Assisted and Skilled Composition

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



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

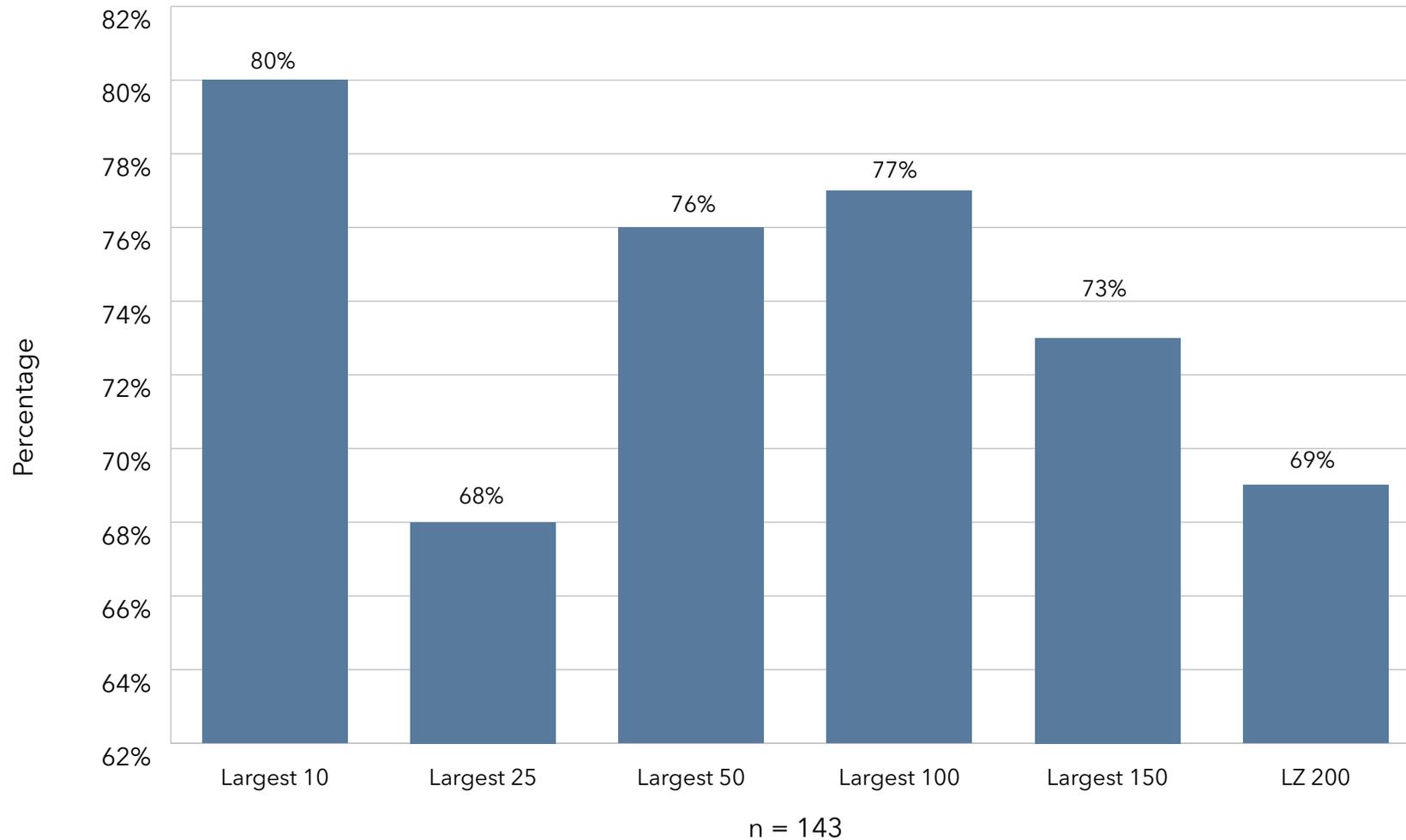
### *Assisted and Skilled Composition*

This report has tracked the proportion of assisted living and skilled nursing units that are private. There is a clear trend toward private assisted living units, with 88% being private. On the other hand, 72% of the skilled nursing units are private.

This year's publication is the ninth in which the percentage of LZ 200 organizations that own and operate memory support (MS) units is analyzed. Section 4-17 details the percentage of LZ 200, by the largest 10, 25, 50, 100, 150, and 200, that offer specialized memory support units. Roughly 64% of the organizations offer memory support, with more than 32% offering both assisted living and skilled nursing memory care services. An additional 56% offer only assisted living memory support.

## Organizational Characteristics: Assisted and Skilled Composition

### Percentage That Offer Memory Support

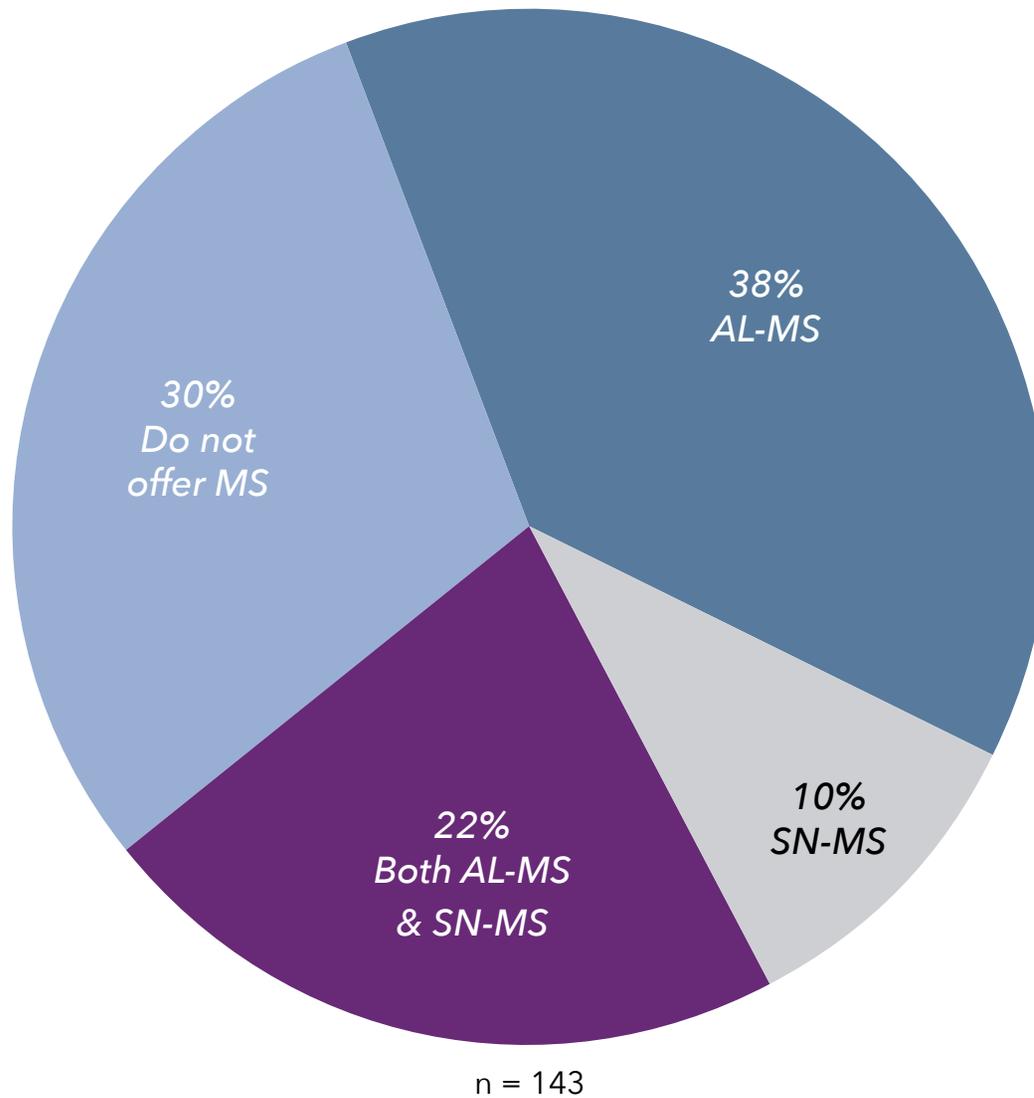


KEY: ■ Offer Memory Support

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

## Organizational Characteristics: Assisted and Skilled Composition

### Type of Memory Support Offered

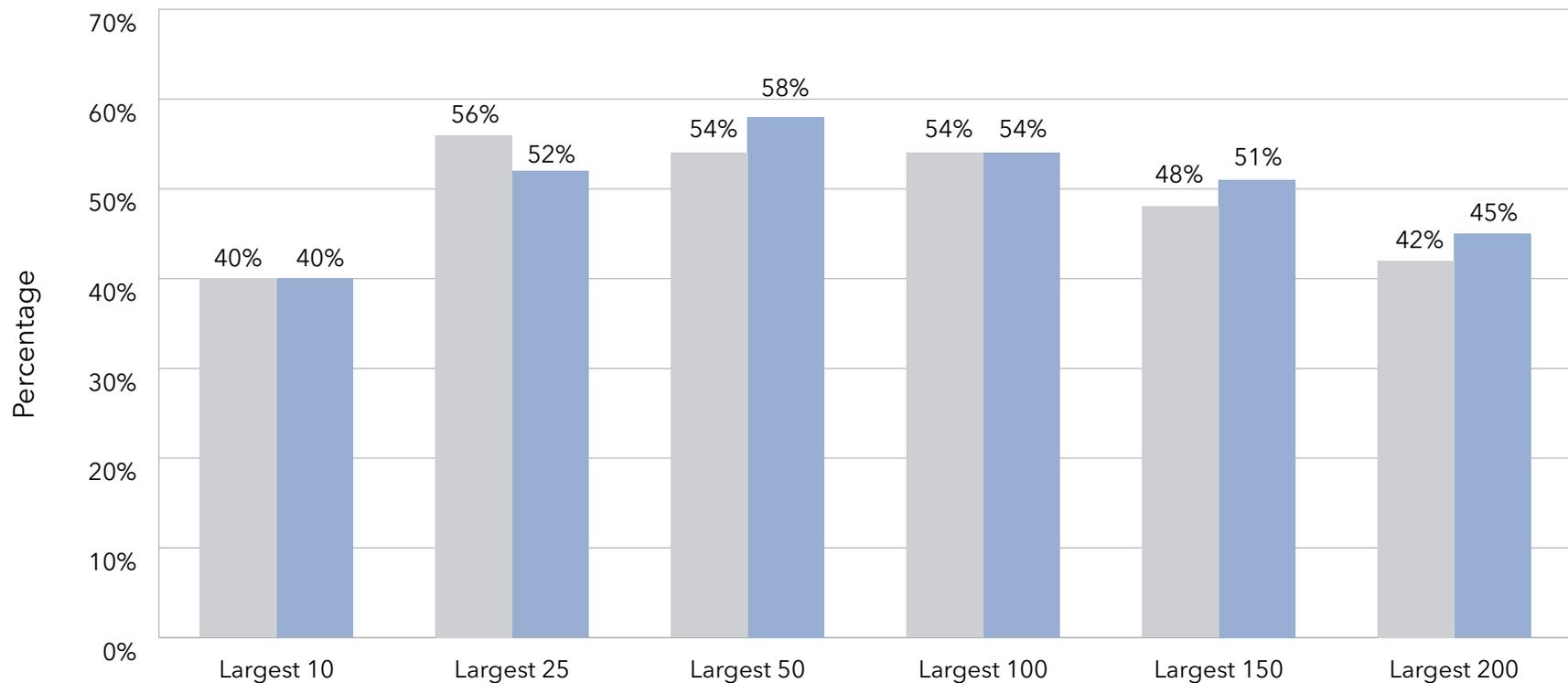


## Organizational Characteristics: Home & Community-Based Services

### Percentage Offering HCBS to Non-Residents

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

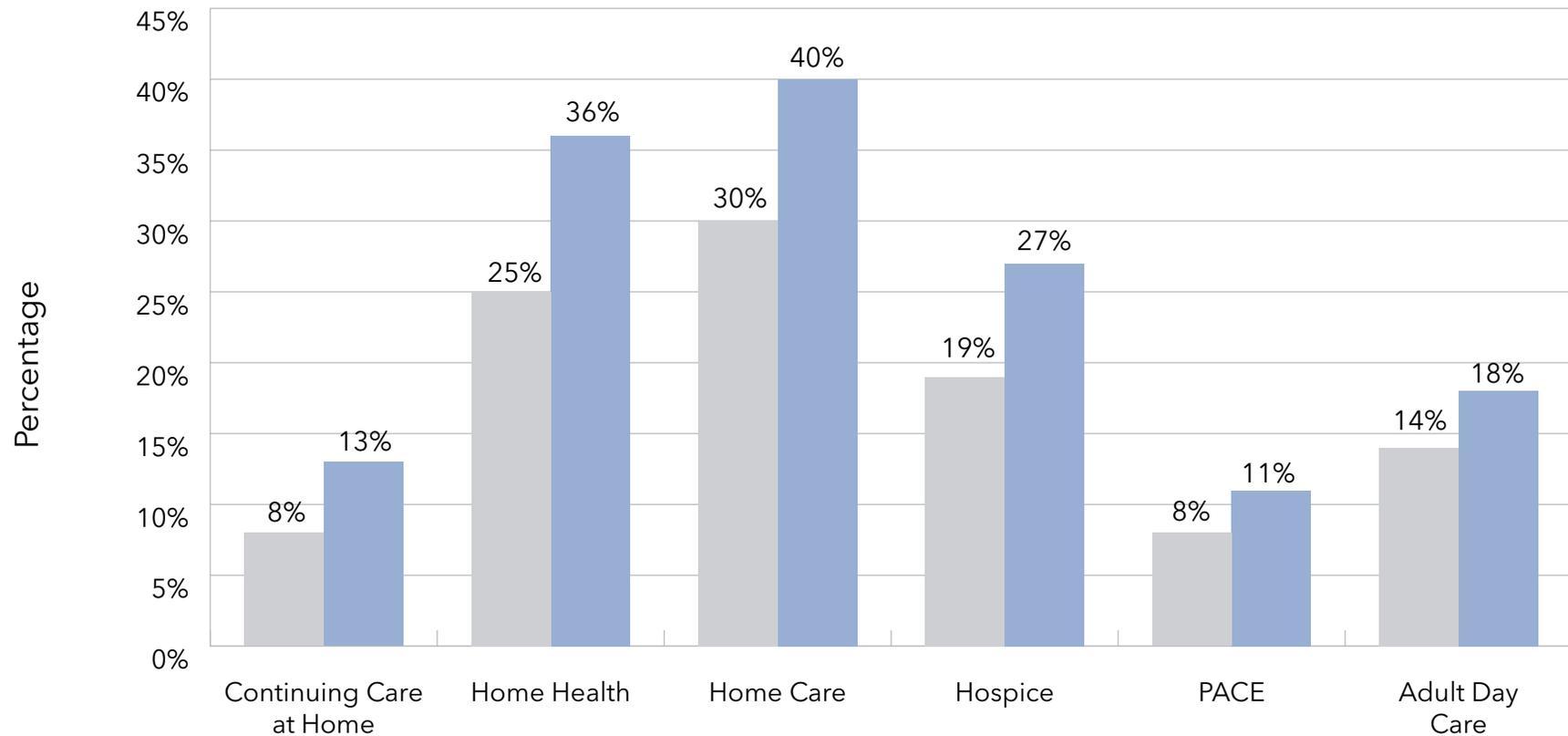
This year's survey gathered overall feedback on the percentage of providers offering home and community-based services, and specifically drilled down into Continuing Care at Home (CCaH), Program of All-Inclusive Care for the Elderly (PACE), and hospice services for individuals in the greater community. Overall, 42% of the LZ 200 organizations offer home and community-based services to non-residents. CCaH, a model that grew in popularity several years ago, is offered by nearly 10% of the LZ 200. Approximately eight percent (8%) have PACE programs, and hospice services are being provided by 19%.



KEY:  2021  2022

n = 149

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



KEY: 2021 2022

n = 149

# Organizational Characteristics: Home & Community-Based Services

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

2023 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
1	Presbyterian Villages of Michigan	MI	>\$50 million
2	St. Paul's Senior Services	CA	>\$50 million
3	Holland Home	MI	>\$50 million
4	Concordia Lutheran Ministries	PA	>\$50 million
5	Brio Living Services fka UMRC and Porter Hills	MI	>\$50 million
6	Ohio Living	OH	>\$50 million
7	Masonicare	CT	\$25-\$50 Million
8	EveryAge	NC	\$25-\$50 Million
9	Presbyterian Homes & Services	MN	\$25-\$50 Million
10	Knute Nelson	MN	\$25-\$50 Million
11	Ecumen	MN	\$25-\$50 Million
12	Goodwin Living fka Goodwin House Incorporated	VA	\$10-\$24 million
13	Felician Services, Inc.	IL	\$10-\$24 million
14	WesleyLife	IA	\$10-\$24 million
15	Community First Solutions	OH	\$10-\$24 million
16	Transforming Age	WA	\$10-\$24 million
17	Acts Retirement-Life Communities	PA	\$10-\$24 million
18	Covenant Living Communities & Services	IL	\$10-\$24 million
19	SpiriTrust Lutheran	PA	\$10-\$24 million
20	Illuminus fka Marquardt Village, Inc.	WI	\$10-\$24 million
21	Lutheran SeniorLife	PA	\$10-\$24 million
22	Hebrew SeniorLife	MA	\$10-\$24 million
23	Westminster-Canterbury on Chesapeake Bay	VA	\$10-\$24 million
24	Wesley	WA	\$10-\$24 million
25	Otterbein SeniorLife	OH	\$10-\$24 million
26	Lutheran Homes of South Carolina Inc.	SC	\$10-\$24 million

n = 85

Reflects revenues for those who provided their information.

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

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

2023 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
27	The Legacy Senior Communities	TX	<\$10 million
28	The Moorings, Incorporated	FL	<\$10 million
29	FellowshipLIFE fka Fellowship Senior Living	NJ	<\$10 million
30	Providence Life Services	IL	<\$10 million
31	Masonic Villages of the Grand Lodge of PA	PA	<\$10 million
32	Springpoint Senior Living	NJ	<\$10 million
33	Lutheran Senior Services	MO	<\$10 million
34	Presbyterian SeniorCare Network	PA	<\$10 million
35	BHI Senior Living, Inc.	IN	<\$10 million
36	Bethesda Health Group, Inc.	MO	<\$10 million
37	Sunnyside Communities	VA	<\$10 million
38	Redstone Presbyterian SeniorCare	PA	<\$10 million
39	Legacy Lifecare	MA	<\$10 million
40	HumanGood	CA	<\$10 million
41	Well•Spring Group	NC	<\$10 million
42	Willow Valley Communities	PA	<\$10 million
43	Eskaton	CA	<\$10 million
44	Parker	NJ	<\$10 million
45	St. John's United	MT	<\$10 million
46	Baptist Village Communities	OK	<\$10 million
47	Ingleside	MD	<\$10 million
48	Asbury Communities, Inc.	MD	<\$10 million
49	Christian Living Communities	CO	<\$10 million
50	Christian Health	NJ	<\$10 million

n = 85

Reflects revenues for those who provided their information.

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

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

2023 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
51	United Methodist Communities	NJ	<\$10 million
52	Benedictine	MN	<\$10 million
53	St. Andrew's Resources for Seniors System	MO	<\$10 million
54	Episcopal SeniorLife Communities	NY	<\$10 million
55	Benevolent Corporation Cedar Community	WI	<\$10 million
56	St. Ann's of Greater Rochester, Inc.	NY	<\$10 million
57	Morningside Ministries	TX	<\$10 million
58	Landis Communities	PA	<\$10 million
59	Christian Care Companies	AZ	<\$10 million
60	Lifespire of Virginia	VA	<\$10 million
61	Methodist Retirement Communities	TX	<\$10 million
62	Masonic Homes of Ky, Inc.	KY	<\$10 million
63	Ascentria Care Alliance	MA	<\$10 million
64	Jewish Senior Life of Metropolitan Detroit	MI	<\$10 million
65	Sun Health Services	AZ	<\$10 million
66	Messiah Lifeways	PA	<\$10 million
67	Menno Haven, Inc.	PA	<\$10 million
68	Wesbury	PA	<\$10 million
69	Lutheran Services Carolinas	NC	<\$10 million
70	Convivial Life Inc.	FL	<\$10 million
71	Genacross Lutheran Services	OH	<\$10 million
72	United Methodist Homes	NY	<\$10 million
73	Garden Spot Communities	PA	<\$10 million
74	Baptist Senior Services	PA	<\$10 million
75	Christian Care Communities	KY	<\$10 million

n = 85

Reflects revenues for those who provided their information.

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

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

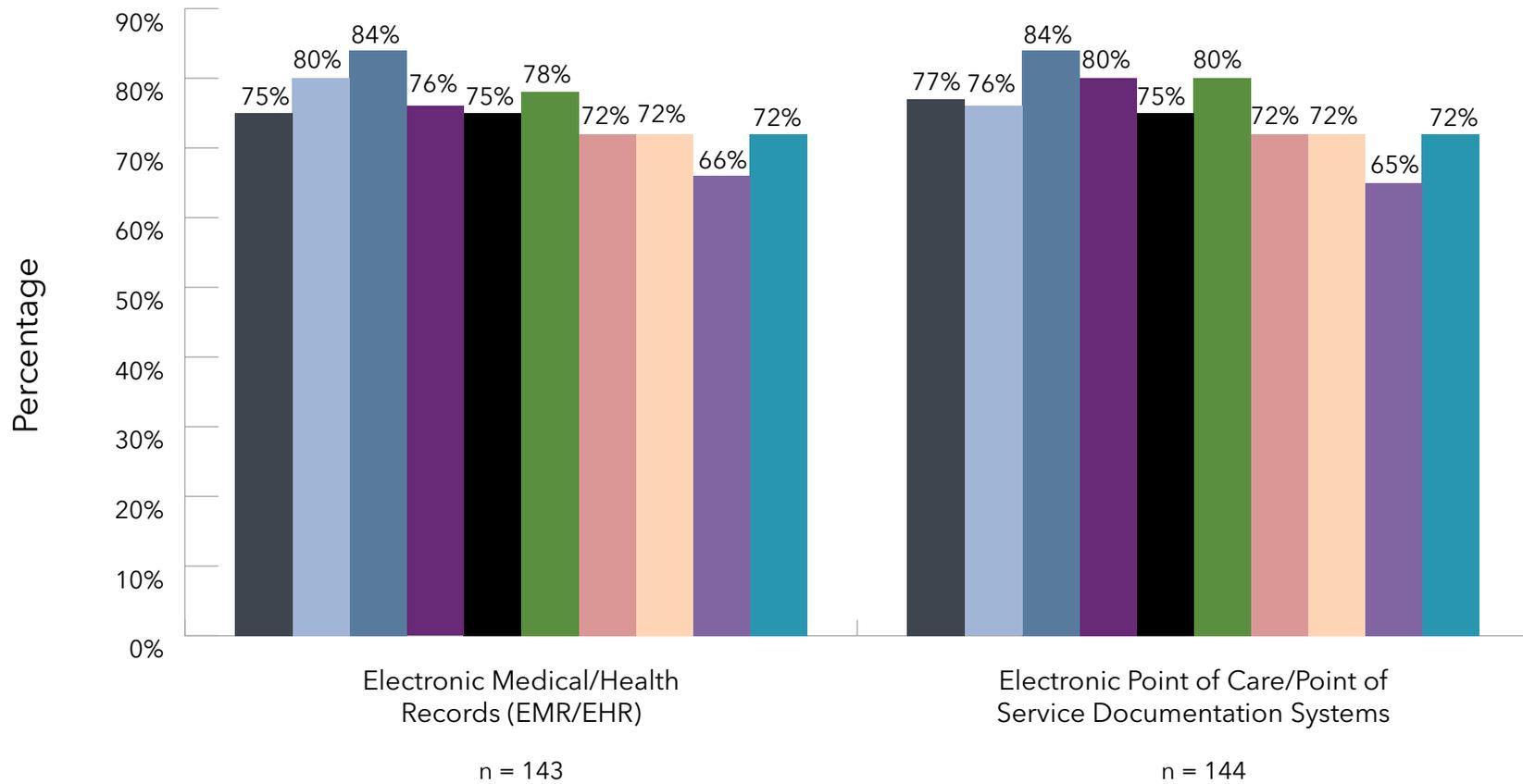
2023 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
76	Simpson Senior Services	PA	<\$10 million
77	Bluestem Communities	KS	<\$10 million
78	Bethany St. Joseph Corporation	WI	<\$10 million
79	Sunset Senior Communities	MI	<\$10 million
80	Lutheran Life Villages	IN	<\$10 million
81	United Church Homes, Inc.	OH	<\$10 million
82	Life Enriching Communities	OH	<\$10 million
83	Alliance Health & Human Services	MA	<\$10 million
84	Buckner Retirement Services	TX	<\$10 million
85	Greencroft Communities	IN	<\$10 million

n = 85

Reflects revenues for those who provided their information.

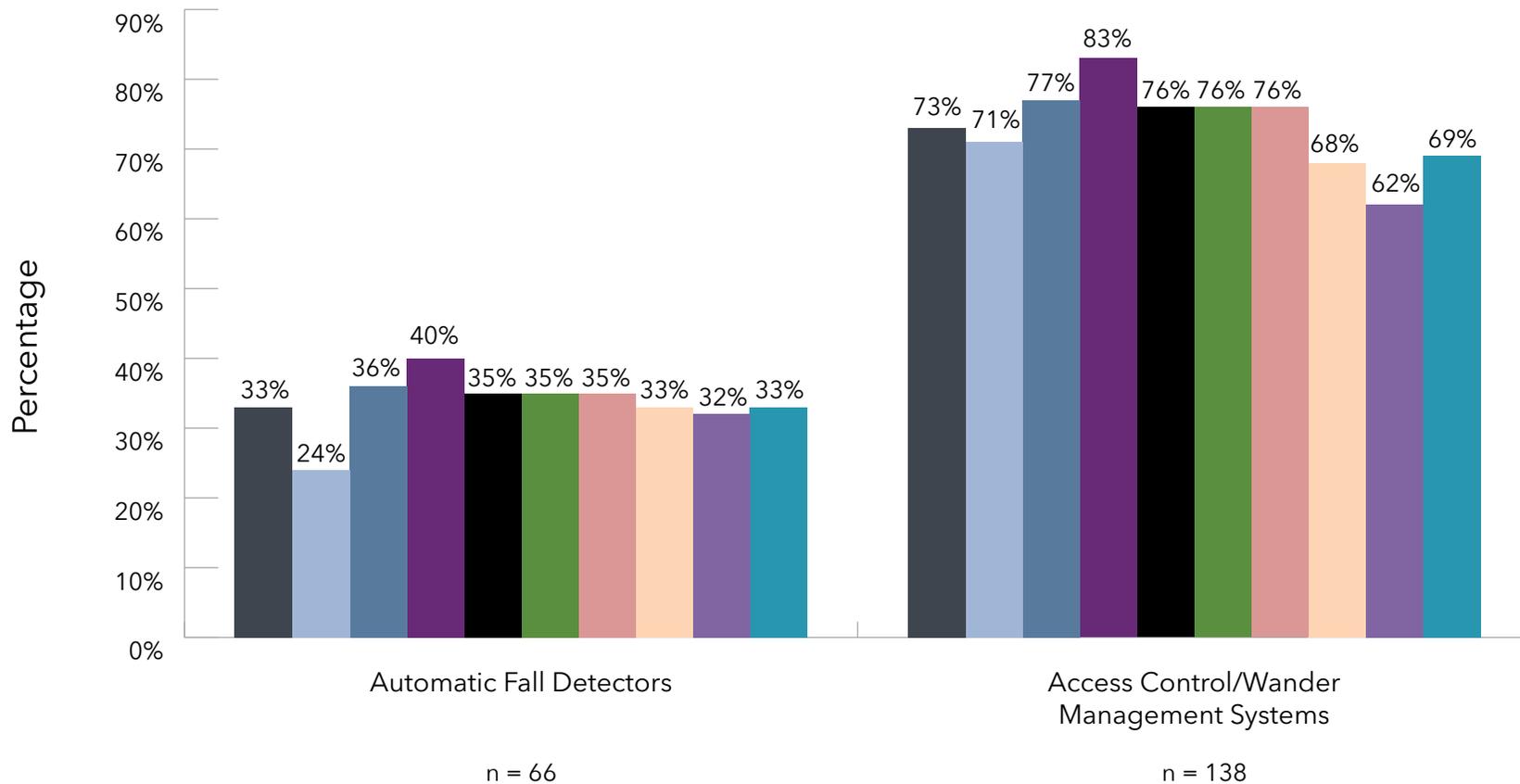
# Organizational Characteristics: Technology Adoption

## Percentage of Communities/Operations Using Electronic Documentation Technologies



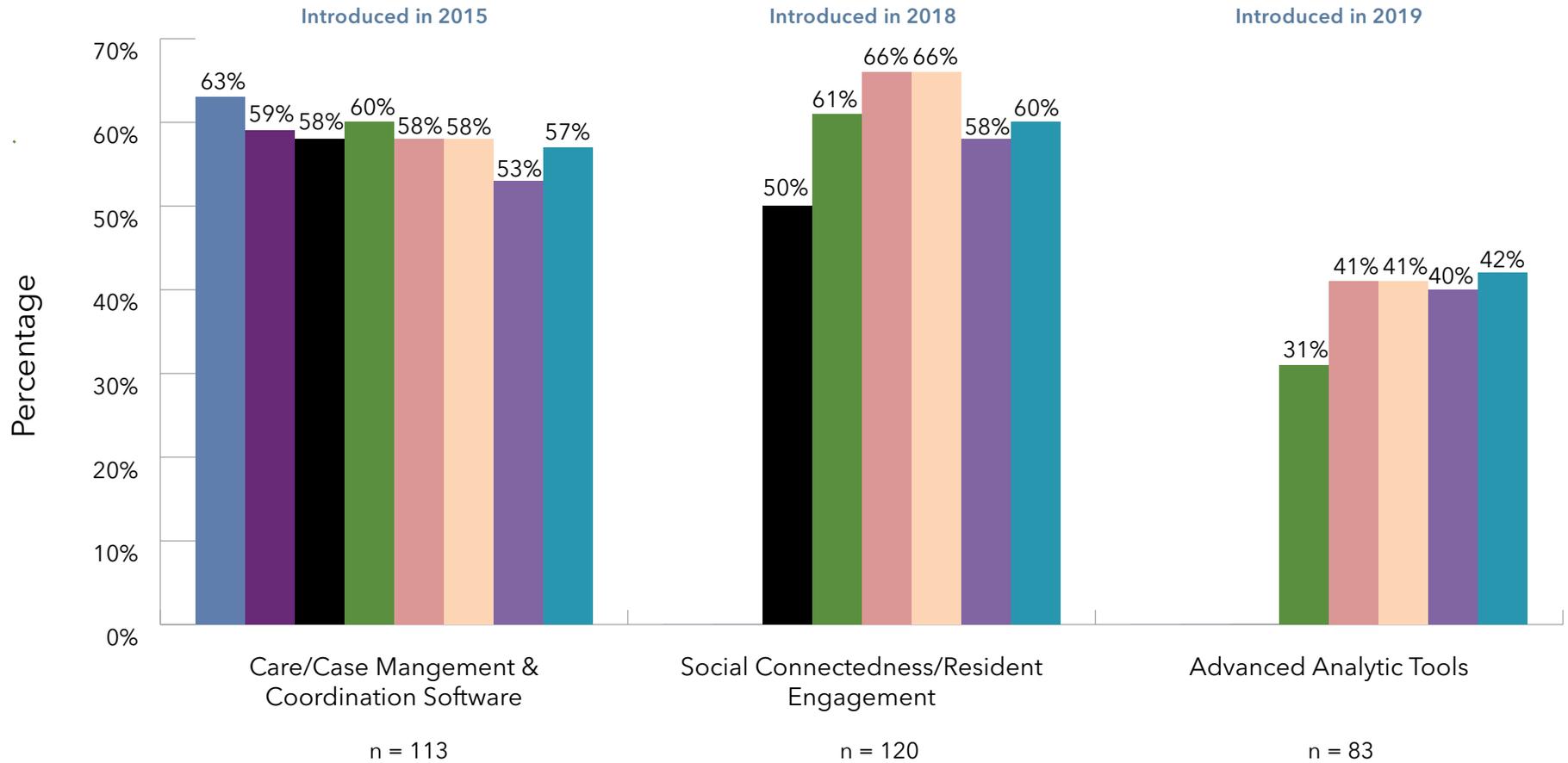
# Organizational Characteristics: Technology Adoption

## Percentage Communities/Operations Using Safety Monitoring Technologies



# Organizational Characteristics: Technology Adoption

## Percentage of Coordination Software & Resident Engagement Technologies

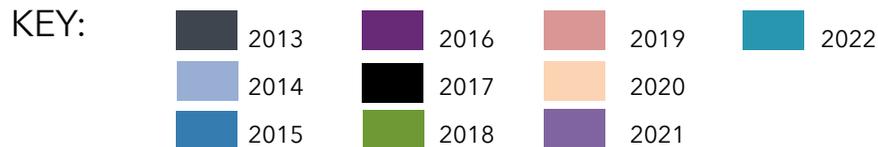
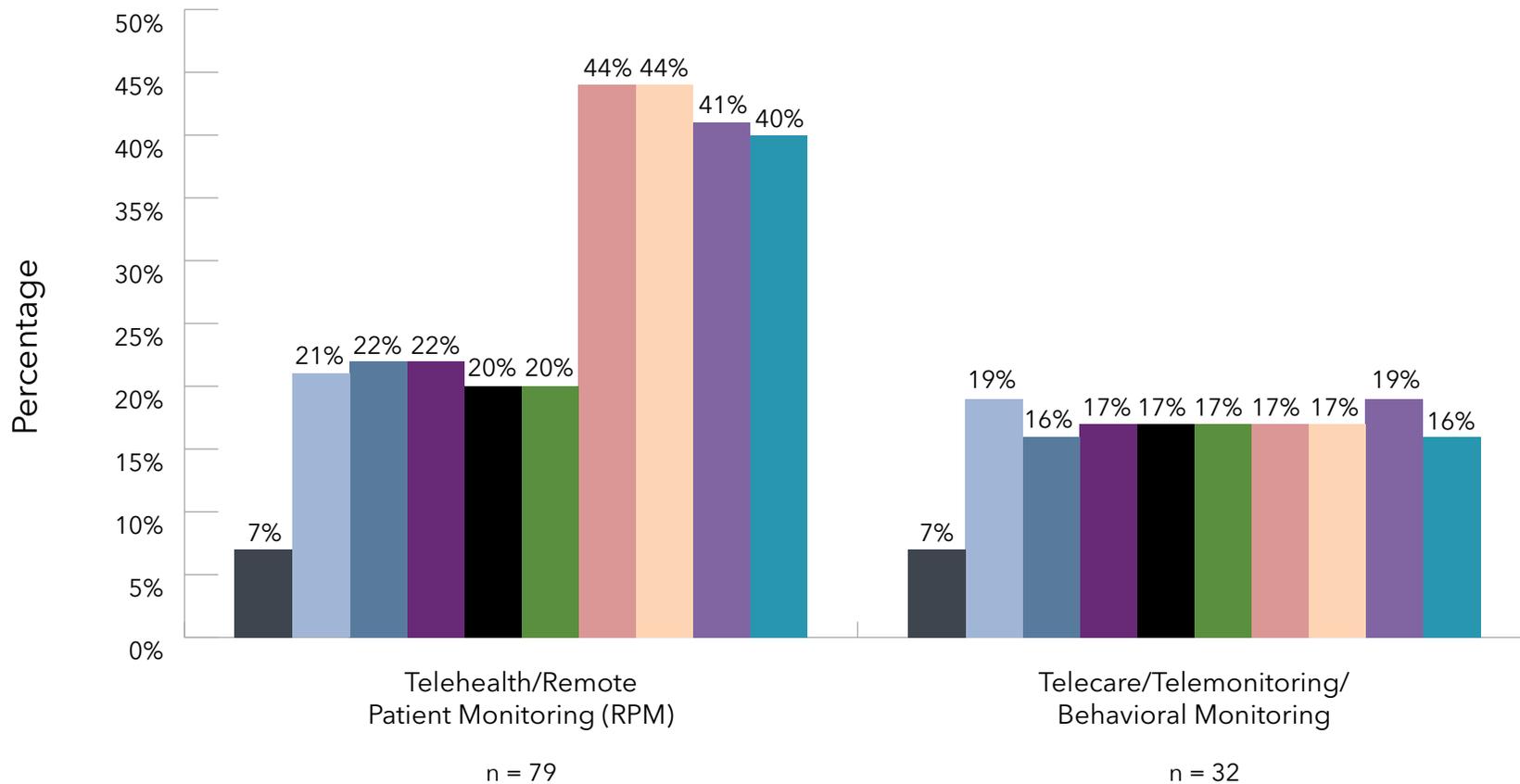


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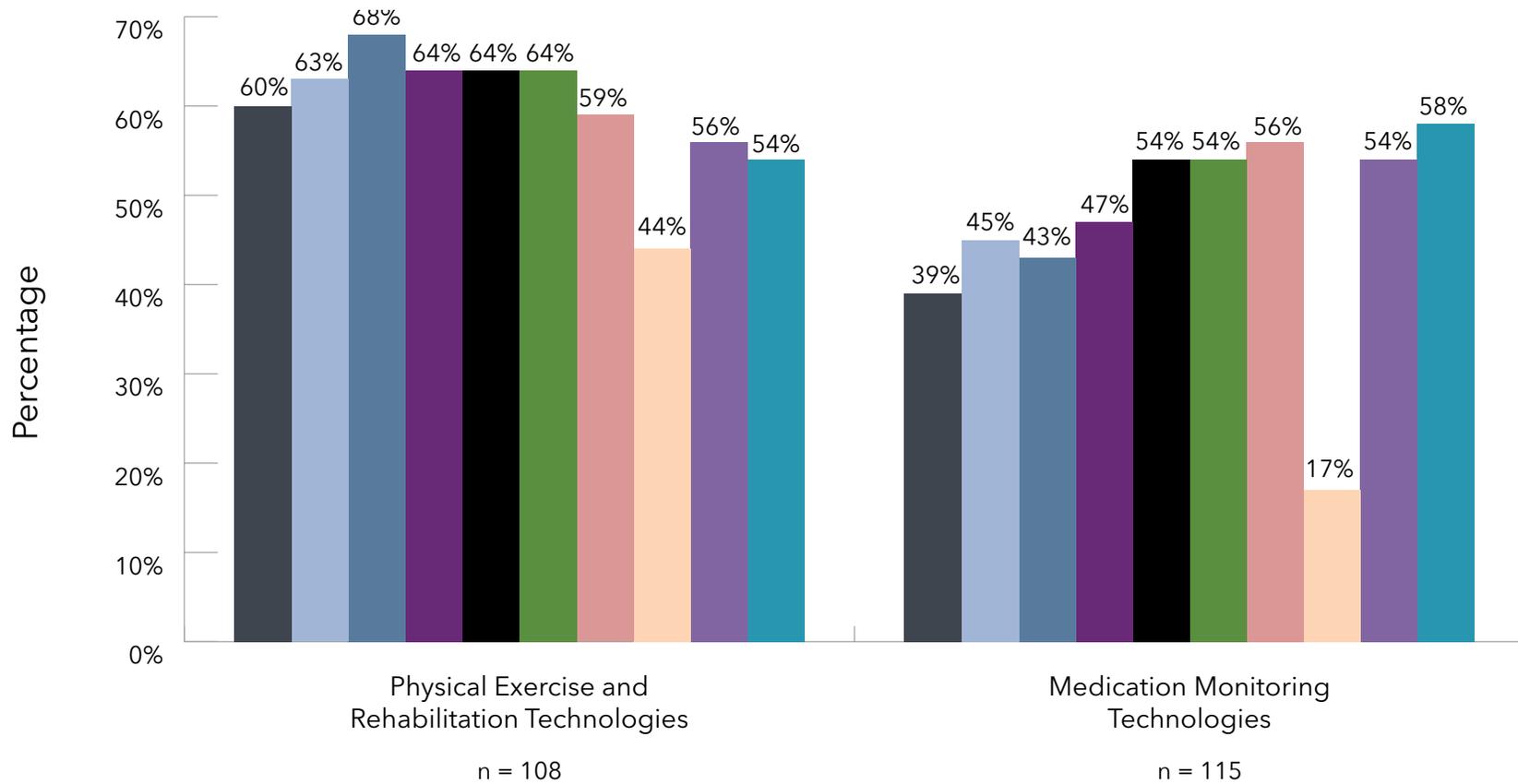
# Organizational Characteristics: Technology Adoption

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



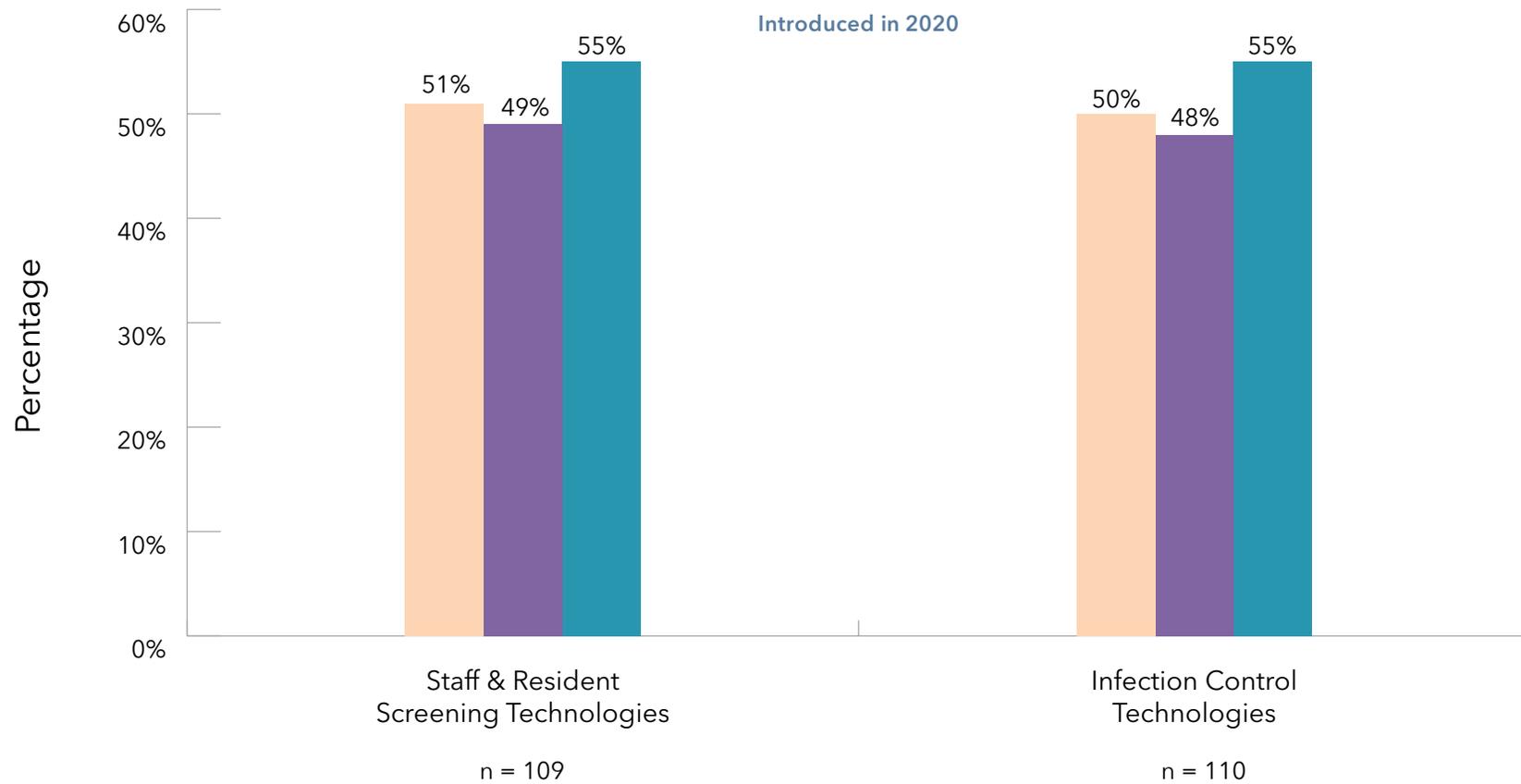
# Organizational Characteristics: Technology Adoption

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



## Organizational Characteristics: Technology Adoption

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



KEY:

2020

2021

2022

## Organizational Characteristics: Technology Adoption

### Type of EMR/EHR Technology

Type of EMR/EHR Technology	
Most Mentions	# of Mentions
PointClickCare	72
MatrixCare	37
Netsmart/MyUnity	26
Eldermark	6
American Data	2
Other	25

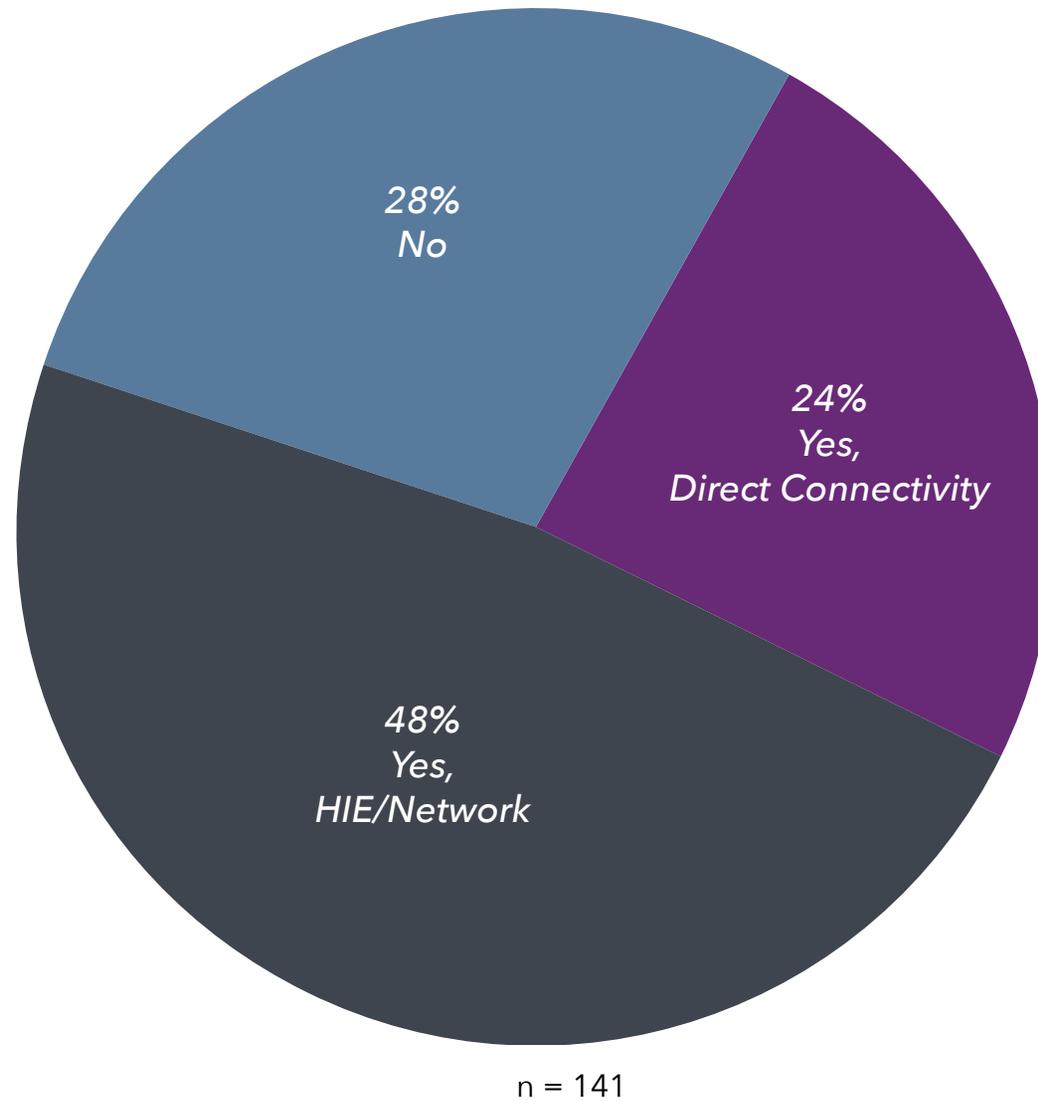
n = 130

130 responses, but multiple mentions

### Technology

Beginning with the 2013 LZ 100, information was gathered regarding the adoption of various aging-related technologies. The technology findings are integrated into section 4-19. The majority of LZ 200 organizations, 62% respectively, reported adopting Access Control/Wander Management Systems. Additional detailed findings are reported throughout that section. Data was once again gathered this year for single-site organizations. Chapter 6 reveals the proportion of those organizations who have adopted various technologies.

## Organizational Characteristics: Technology Adoption *Health Information Exchange*



## Organizational Characteristics: Technology Adoption

### *Type of Physical Robot*

Adoption of Physical Robots by Type	
Most Mentions	# of Mentions
Bear Robotics Inc./Servi	18
Power Automate	2
ICE Cobotics	1
Lytbot	1
Microsoft Dynamics 365	1
Robotic Lawn Mower	1
Roomba (Commercial Grade)	1
Staff Augmentation Robotic Assistant	1
Termi	1

n = 23

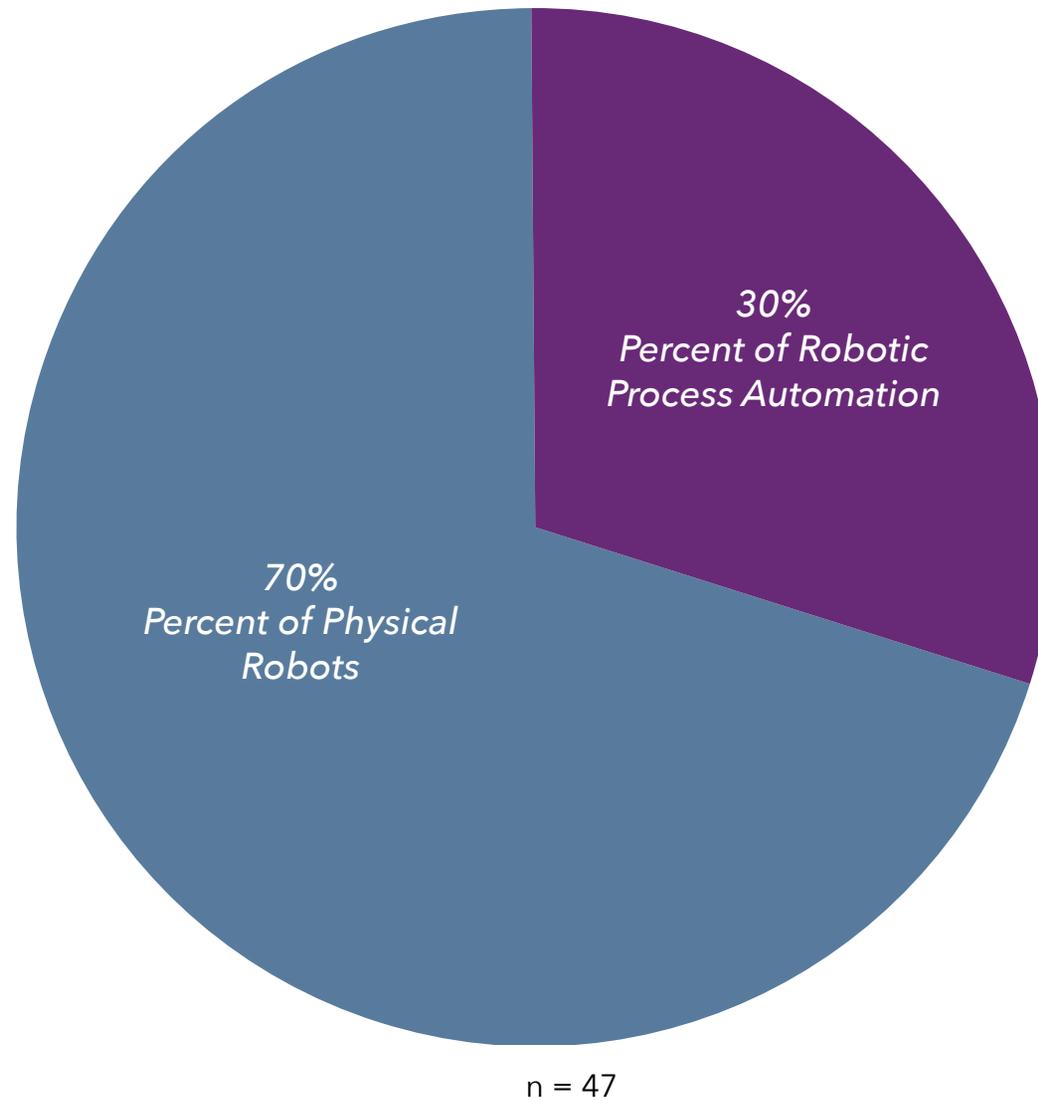
23 responses, but multiple mentions

### *Robotic Technology*

Adoption of robotic solutions utilized in community operations.

## Organizational Characteristics: Technology Adoption

### *Robotic Technology*

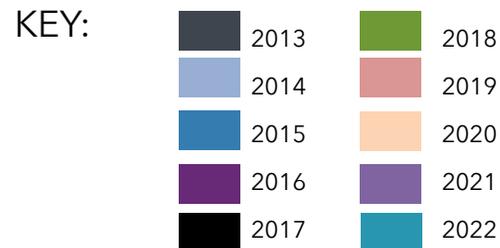
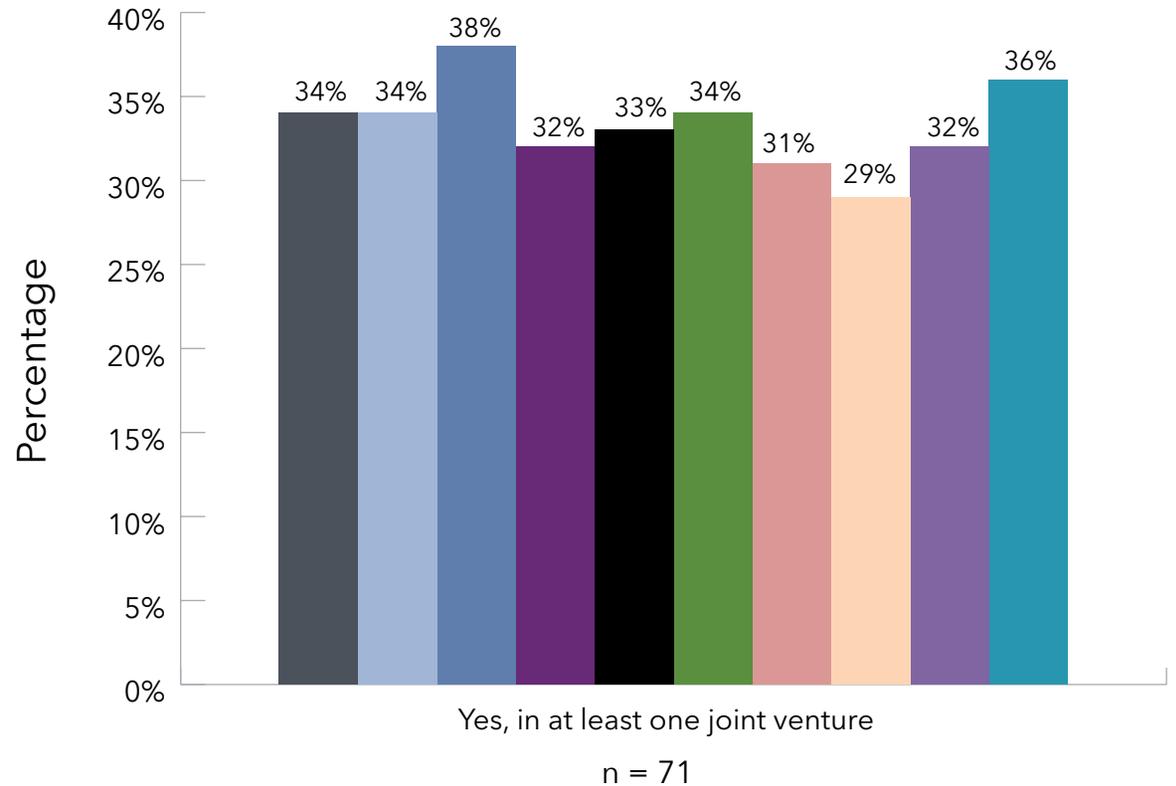


# Organizational Characteristics: Joint Ventures

## Percentage Engaged in a Joint Venture

### Joint Ventures

In-line with trending around partnerships and collaboration, the publication explores the number of LZ 200 organizations that are engaged in joint ventures. Slightly more than one-third of the LZ 200 organizations reported being in a joint venture, most commonly, with another not-for-profit organization, a hospital/health system or a home health/home care agency.



## Organizational Characteristics: Joint Ventures

### *Type of Joint Venture*

Type of Joint Venture	
Most Mentions	# of Mentions
Another NFP Senior Living Provider	61
Home Health/Home Care	27
Hospital/Health System/Mobile Medical	24
HUD/Affordable Housing	21
Physician's Group	16
Hospice	15
PACE	13
Case Management	9
Pharmacy	5
Church/University	5

n = 71

71 responses, but multiple mentions

# Chapter 5

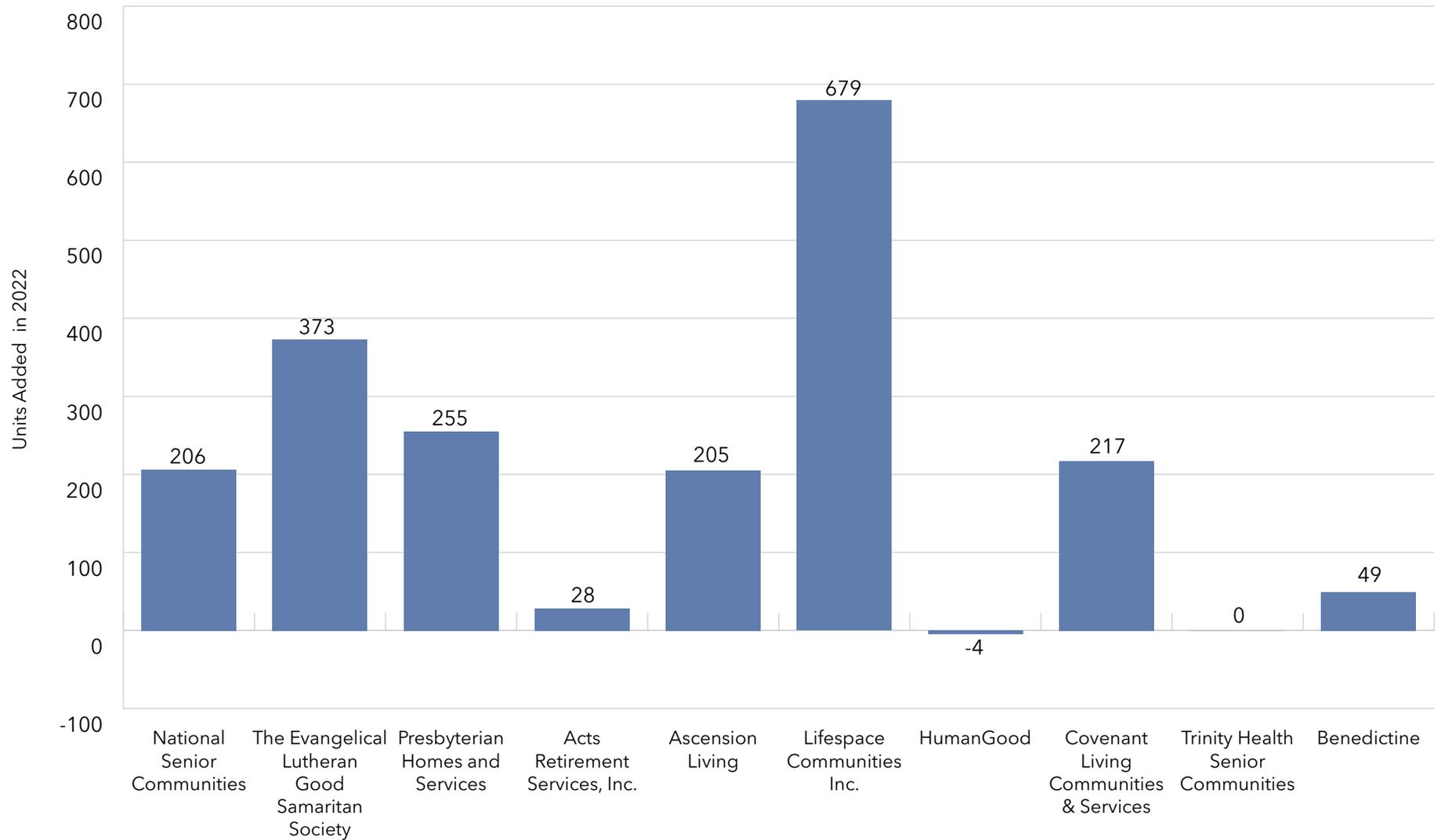
## *Growth and Change*

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



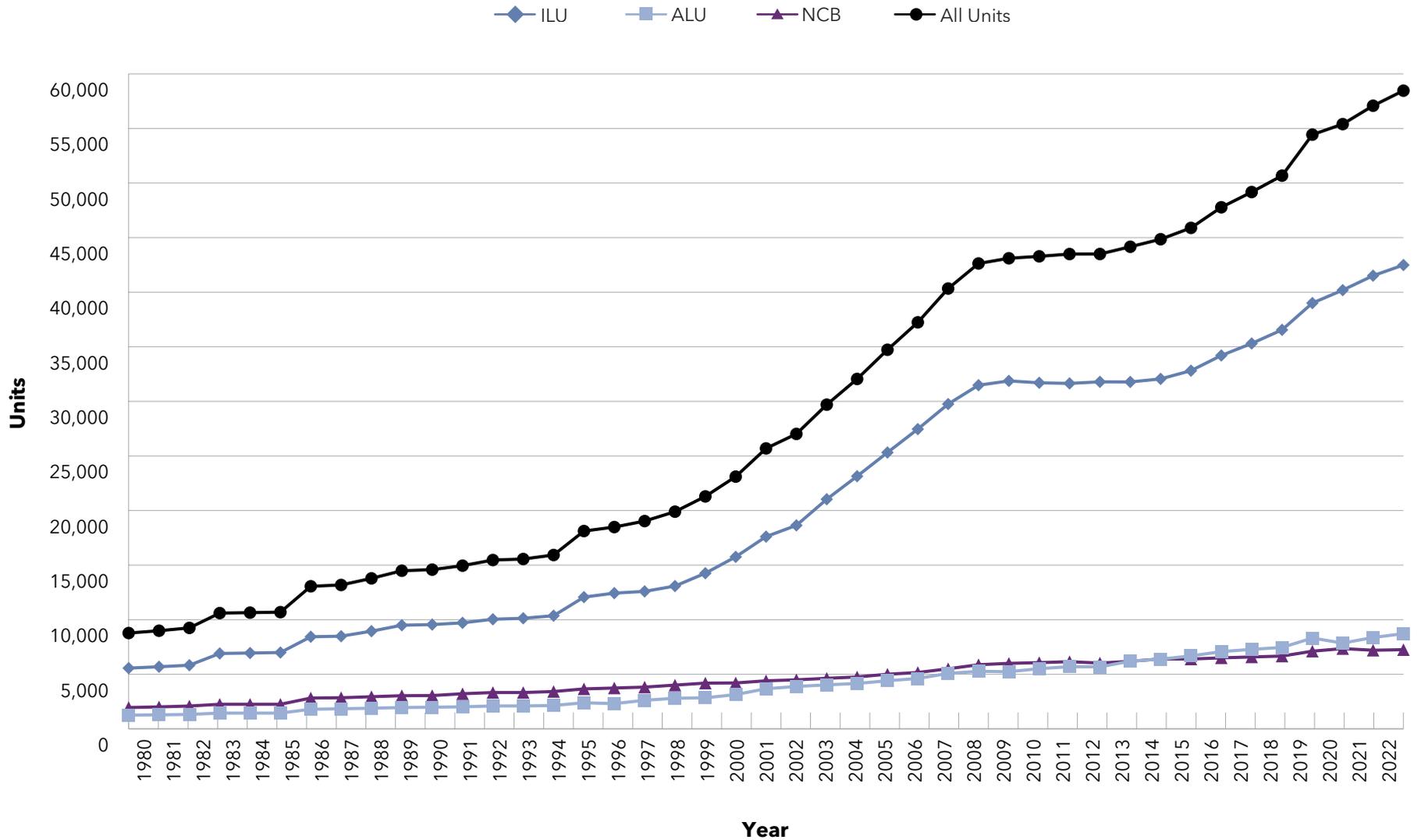


## Growth: Growth of Largest 10 Systems



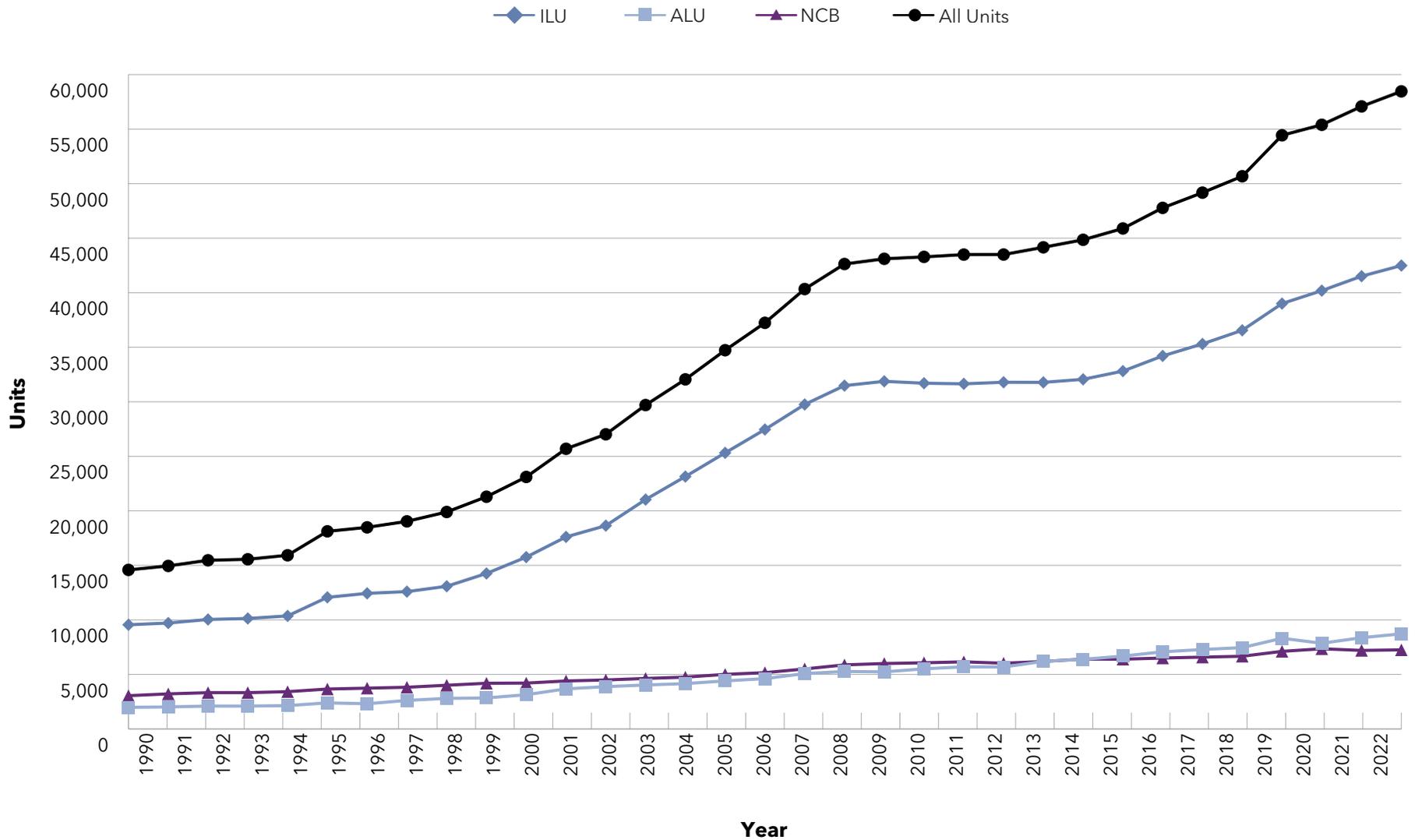
# Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1980

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



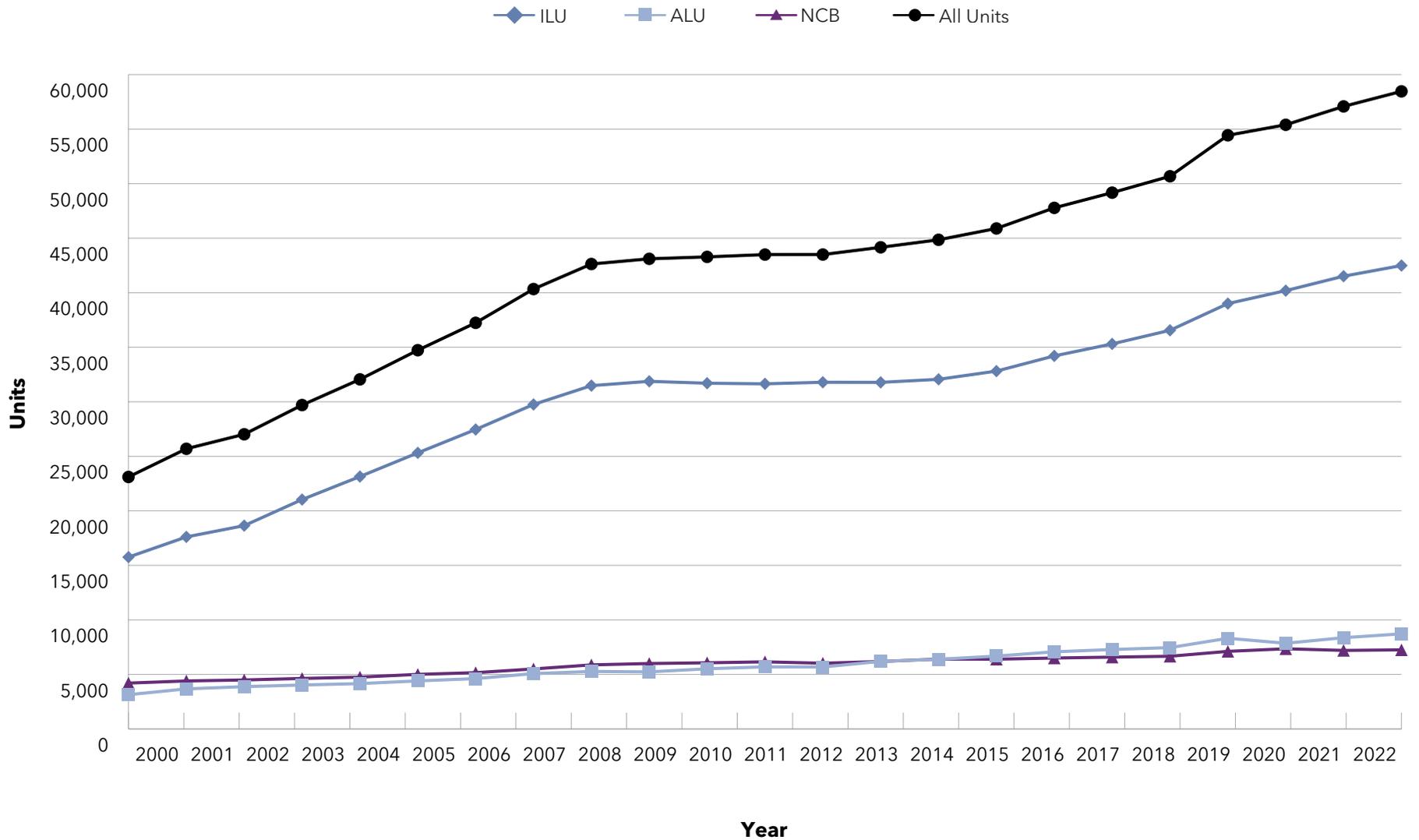
# Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1990

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



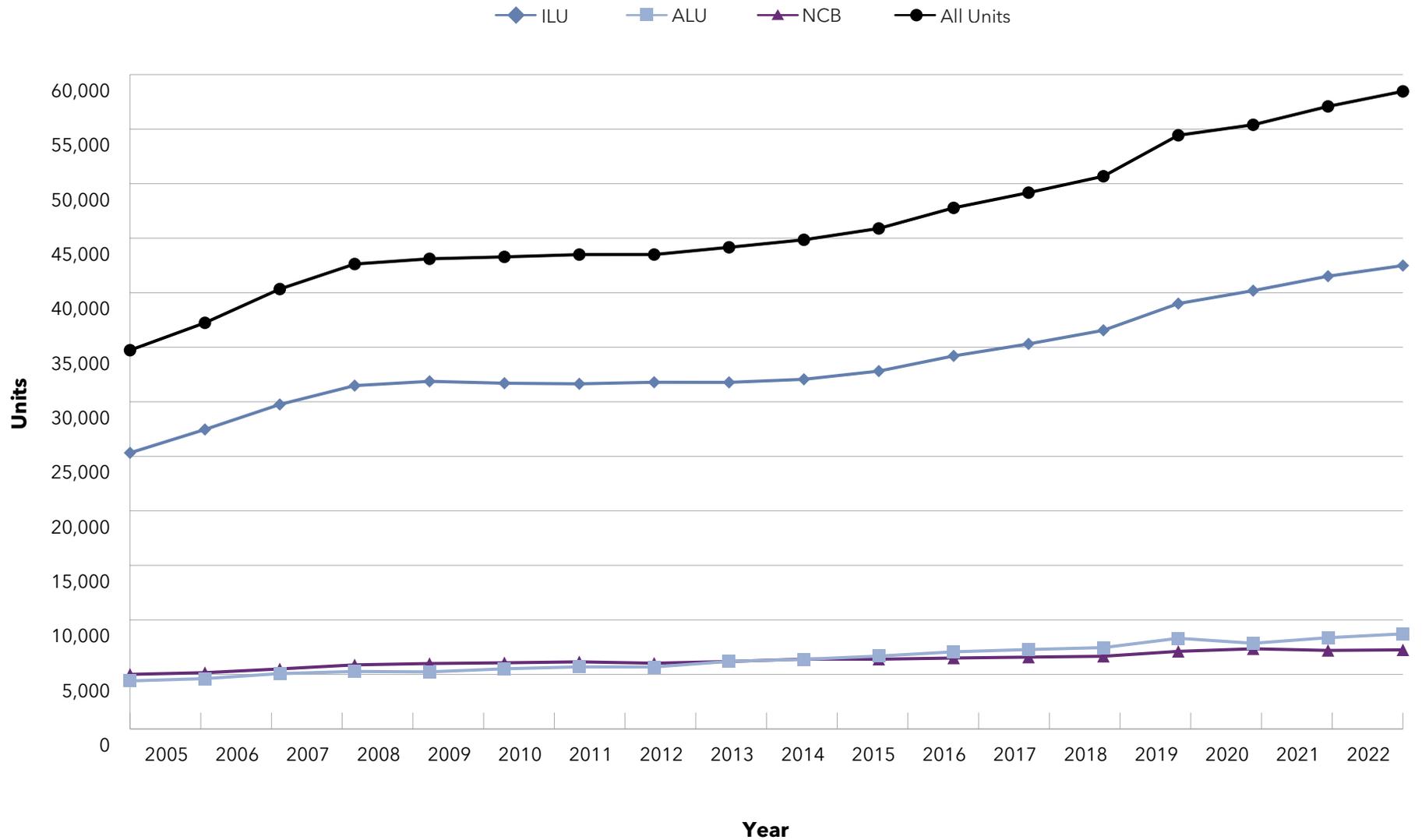
# Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2000

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



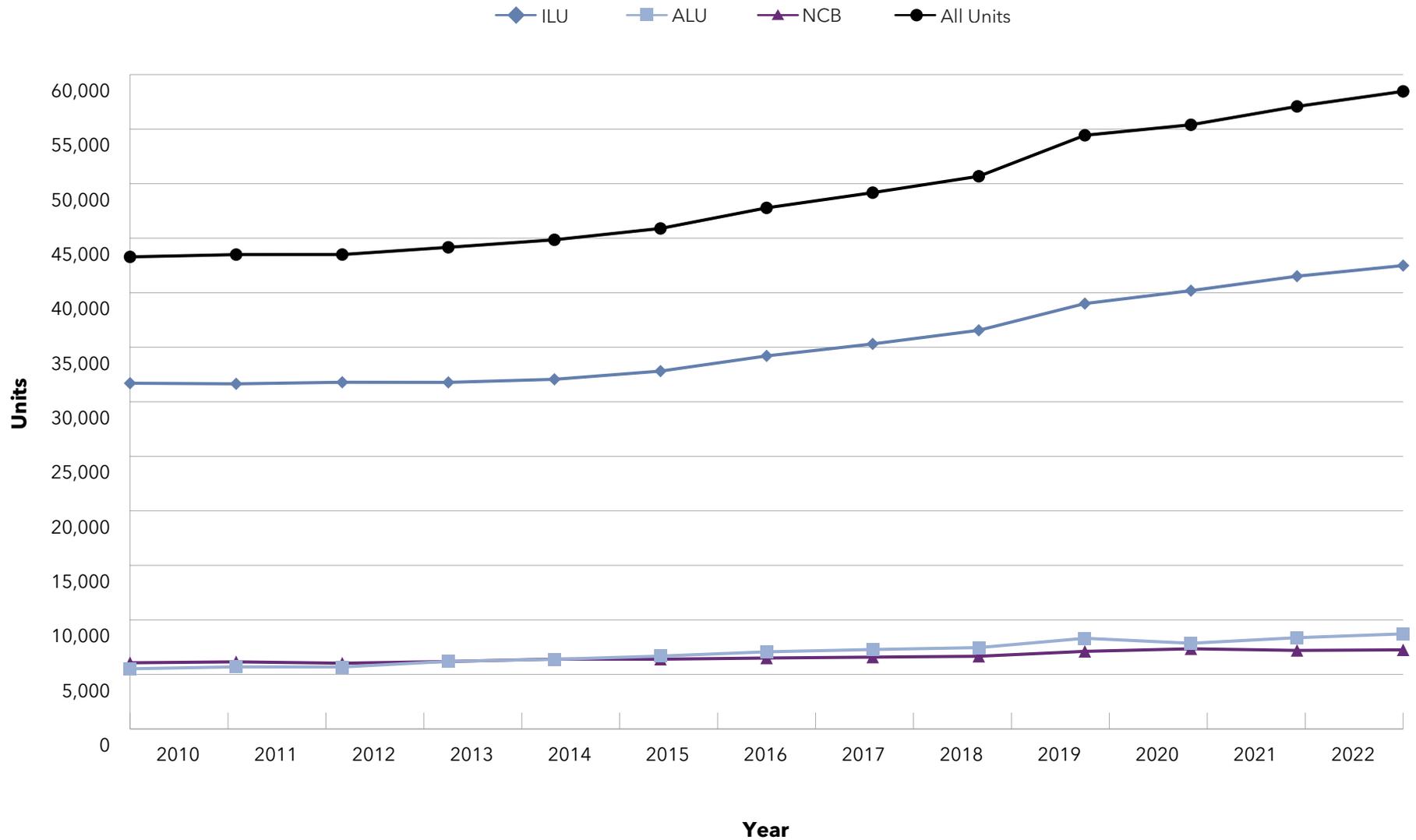
## Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005

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



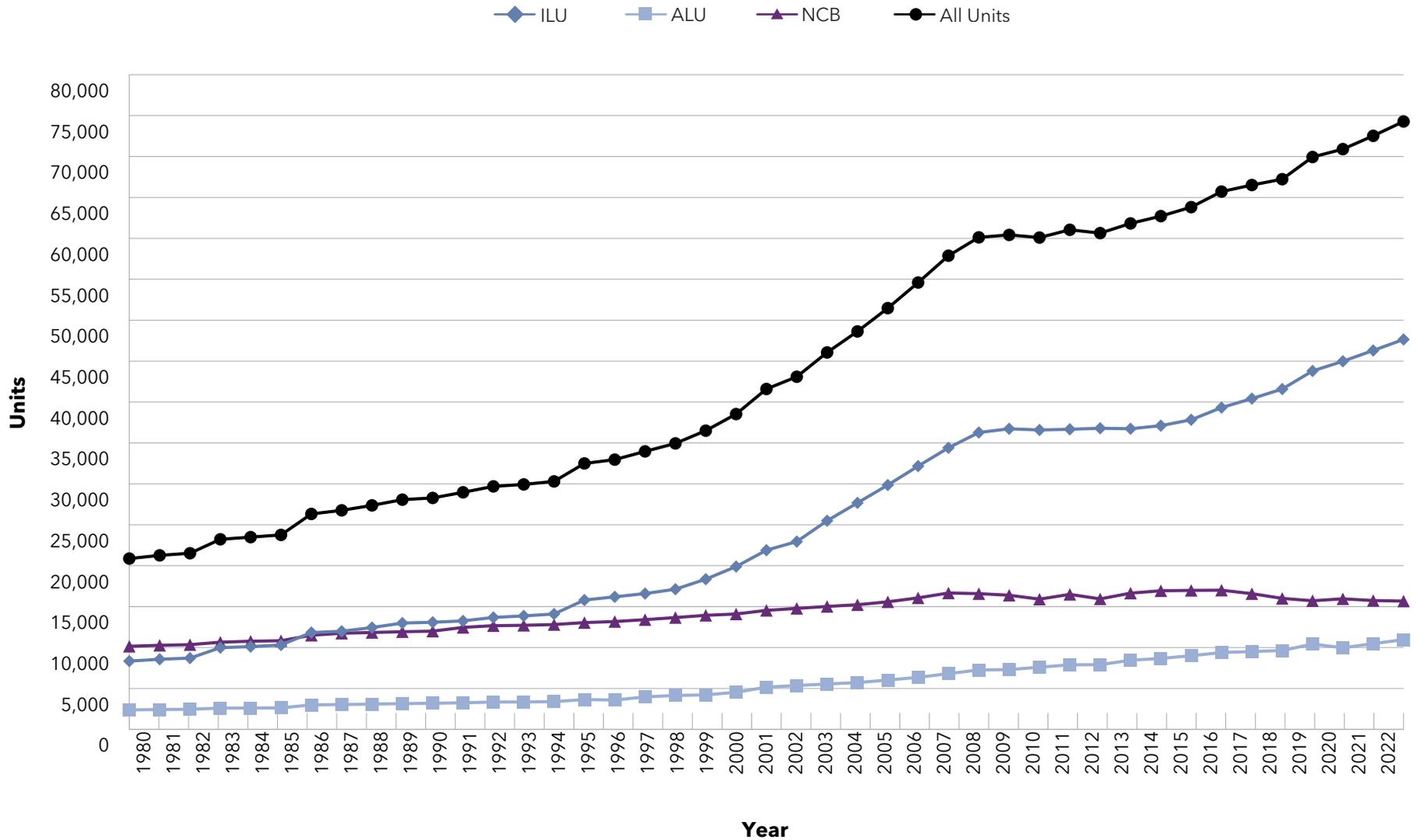
## Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2010

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



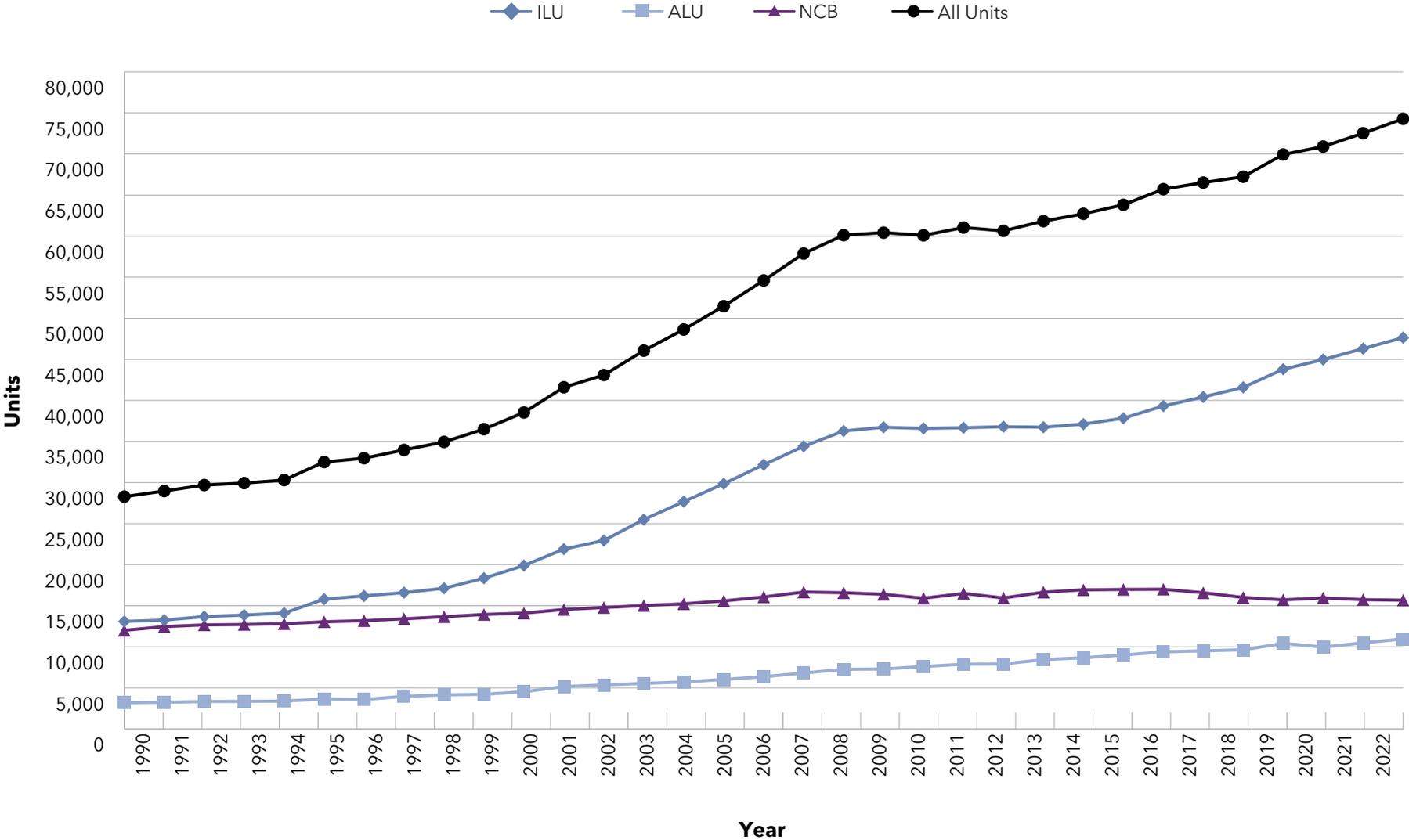
# Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1980

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



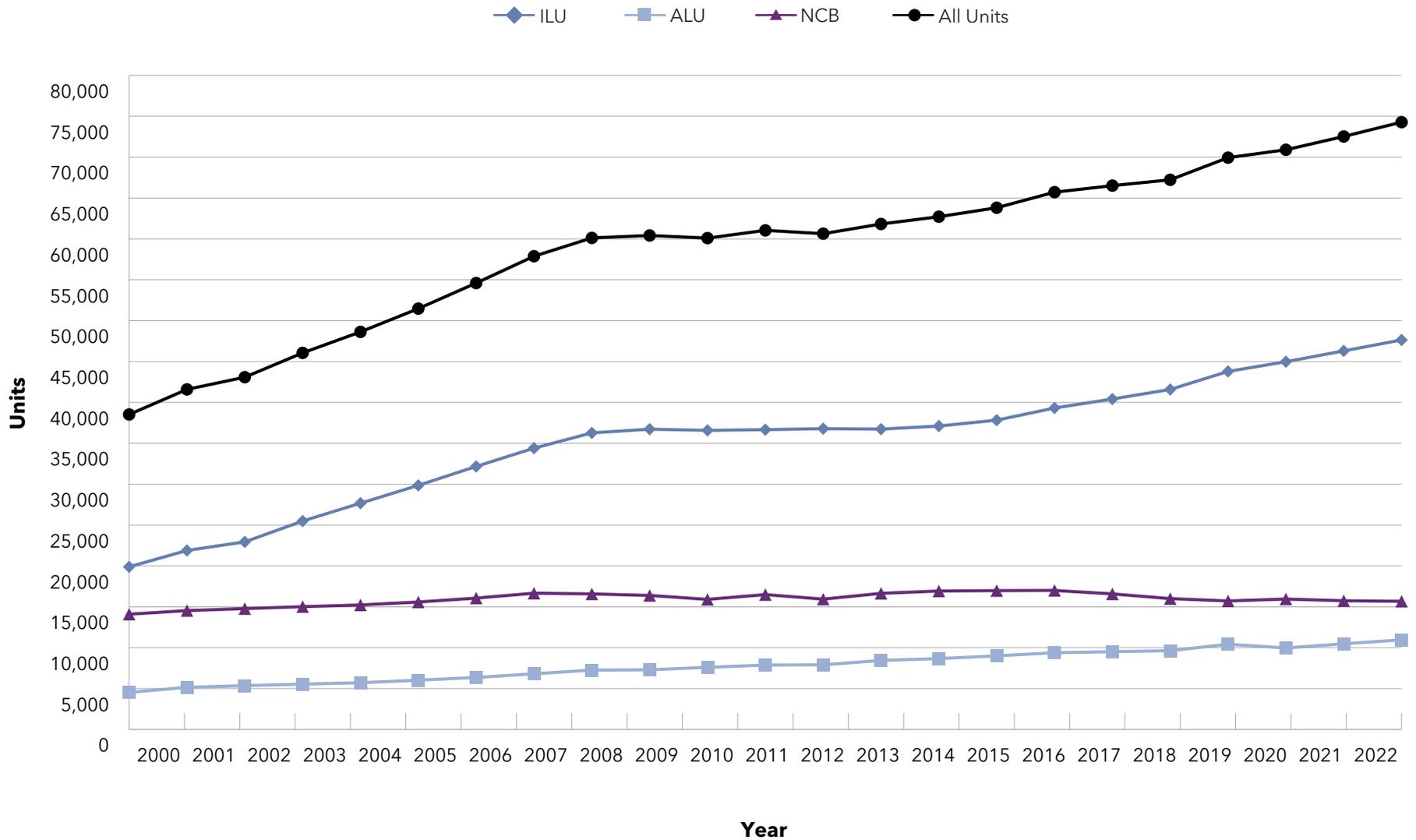
# Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1990

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



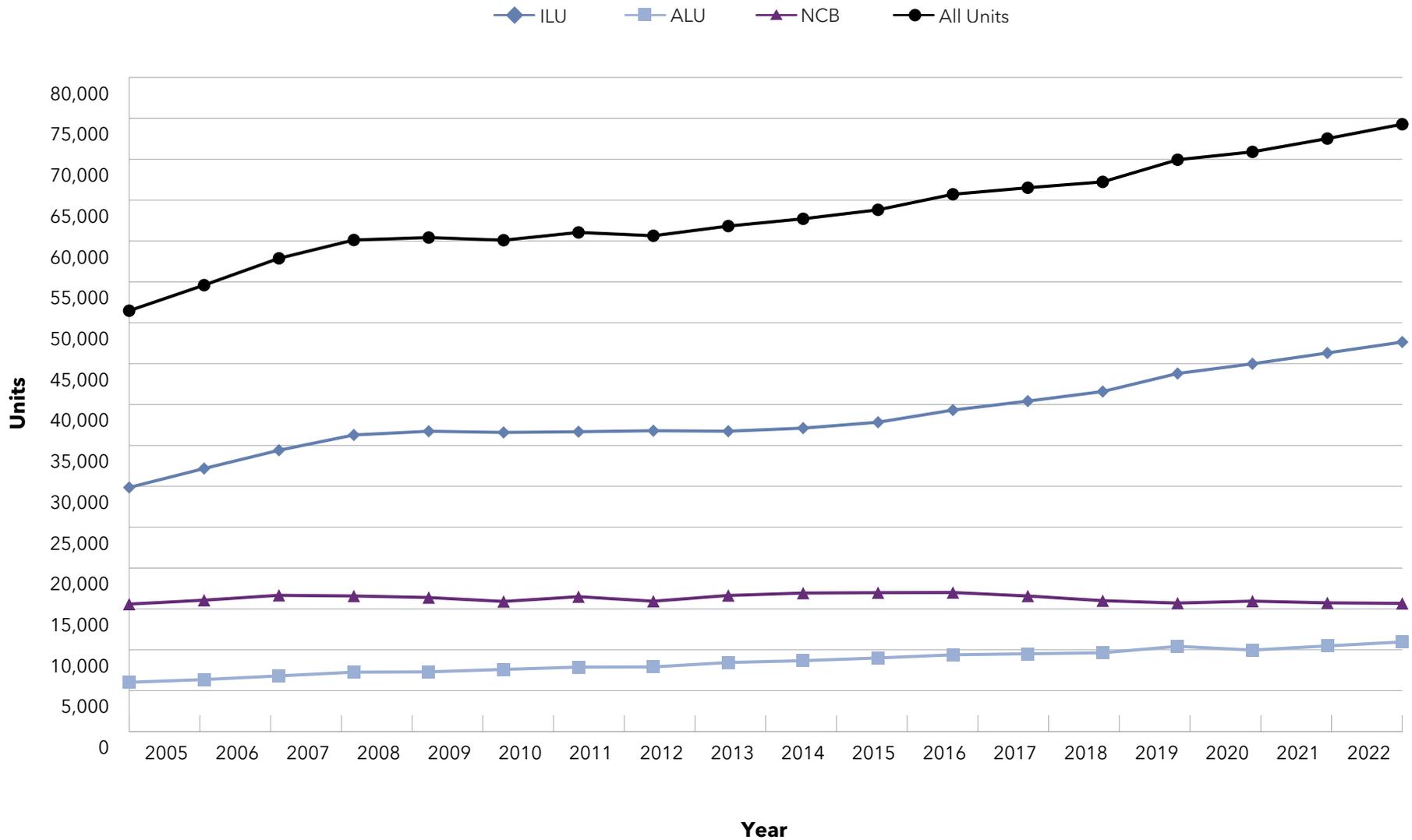
# Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2000

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



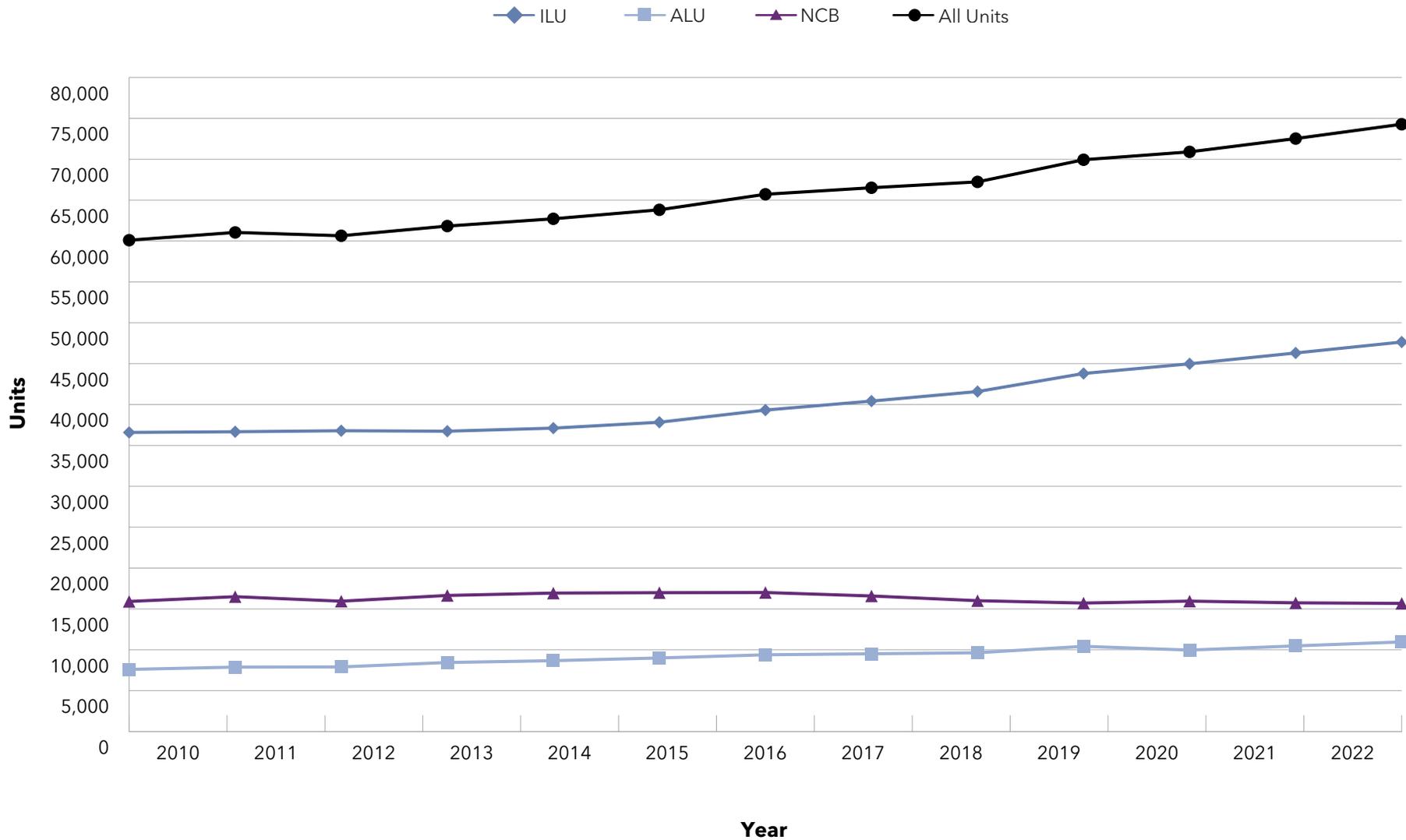
# Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005

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



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

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



## Pace of Growth: The Largest 25 Systems

Pace of Growth charts (Charts 5-2a-t) trace the growth patterns of 20 of the 25 largest multi-sites in the LZ 200. Each significant point of growth in a multi-site's history is marked and explained on the chart. Five of the largest 25 organizations of the LZ 200 were excluded because of insufficient historical detail: The Evangelical Lutheran Good Samaritan Society (LZ 200 #2), Ascension Living (LZ 200 #5), Trinity Health Senior Communities (LZ 200 #9), Benedictine Health (LZ 200 #10), and The Carmelite System (LZ 200 #23). The Pace of Growth charts show the different methods of change the systems are employing. Significant new

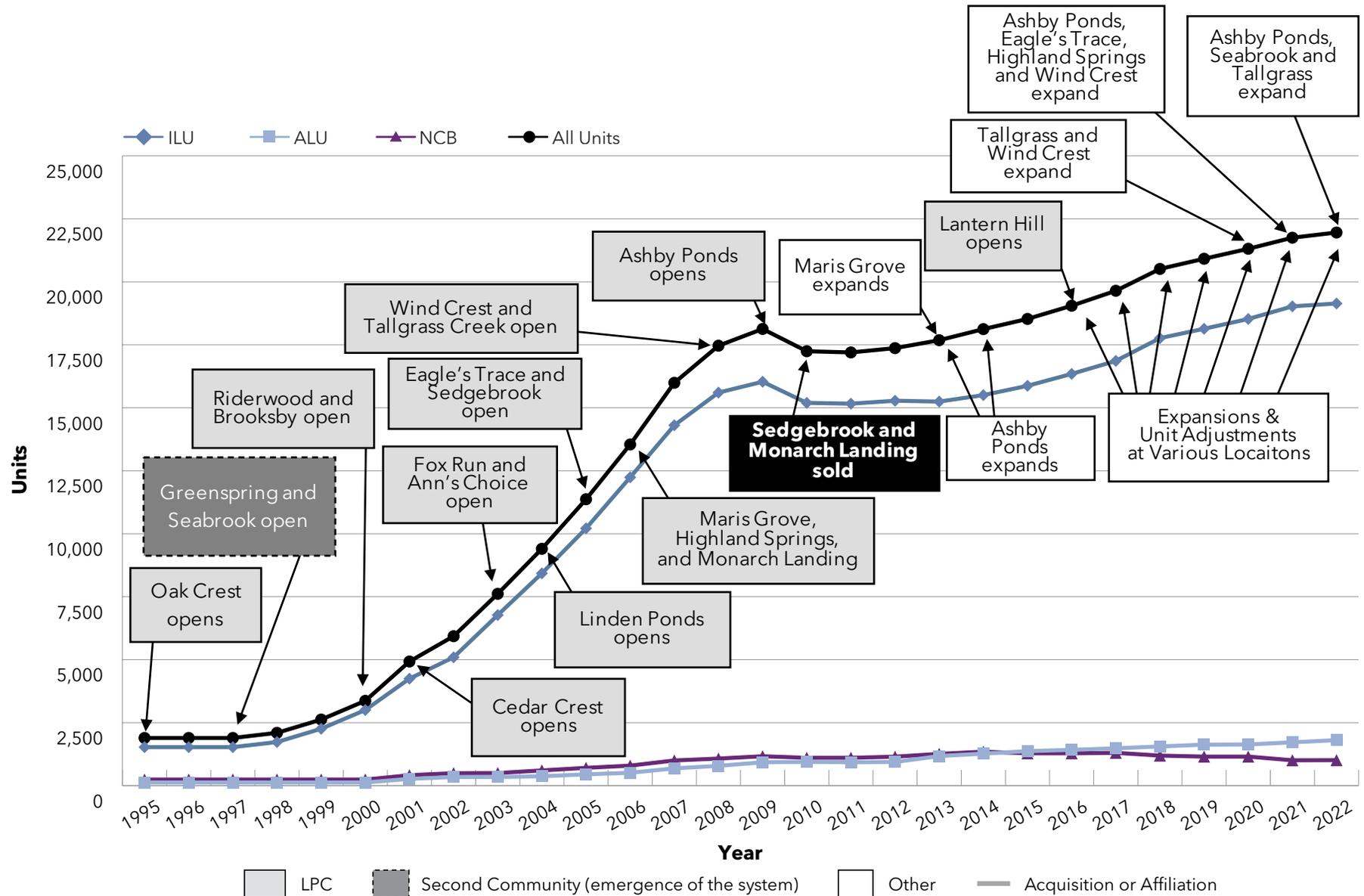
community construction and expansions are noted, with the addition of the second community highlighted in a dashed box. Mergers and acquisitions (gray-framed box) and dispositions (bold black box) are also highlighted.

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



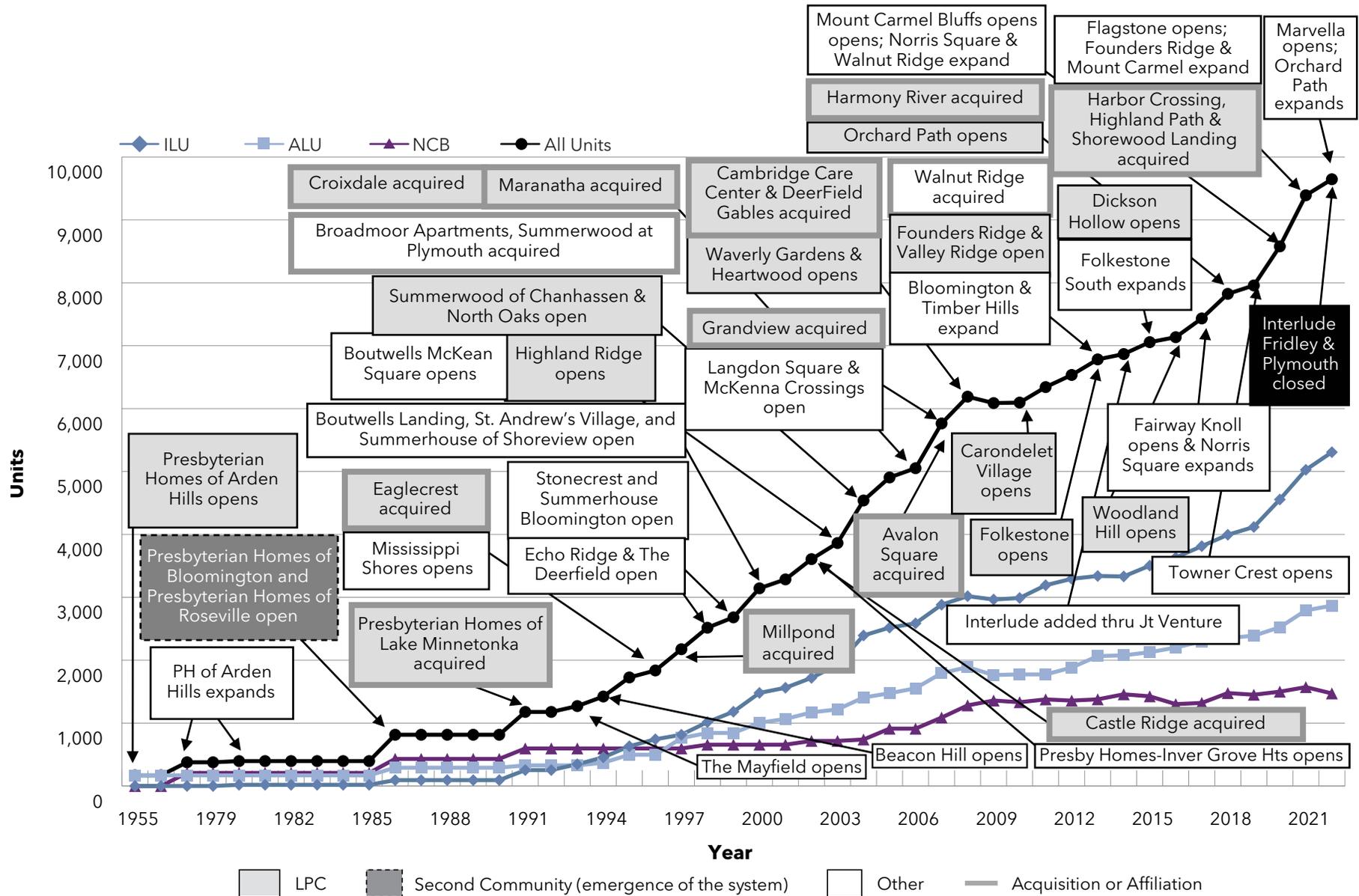
# Growth: Pace of Growth

## National Senior Communities (MA)



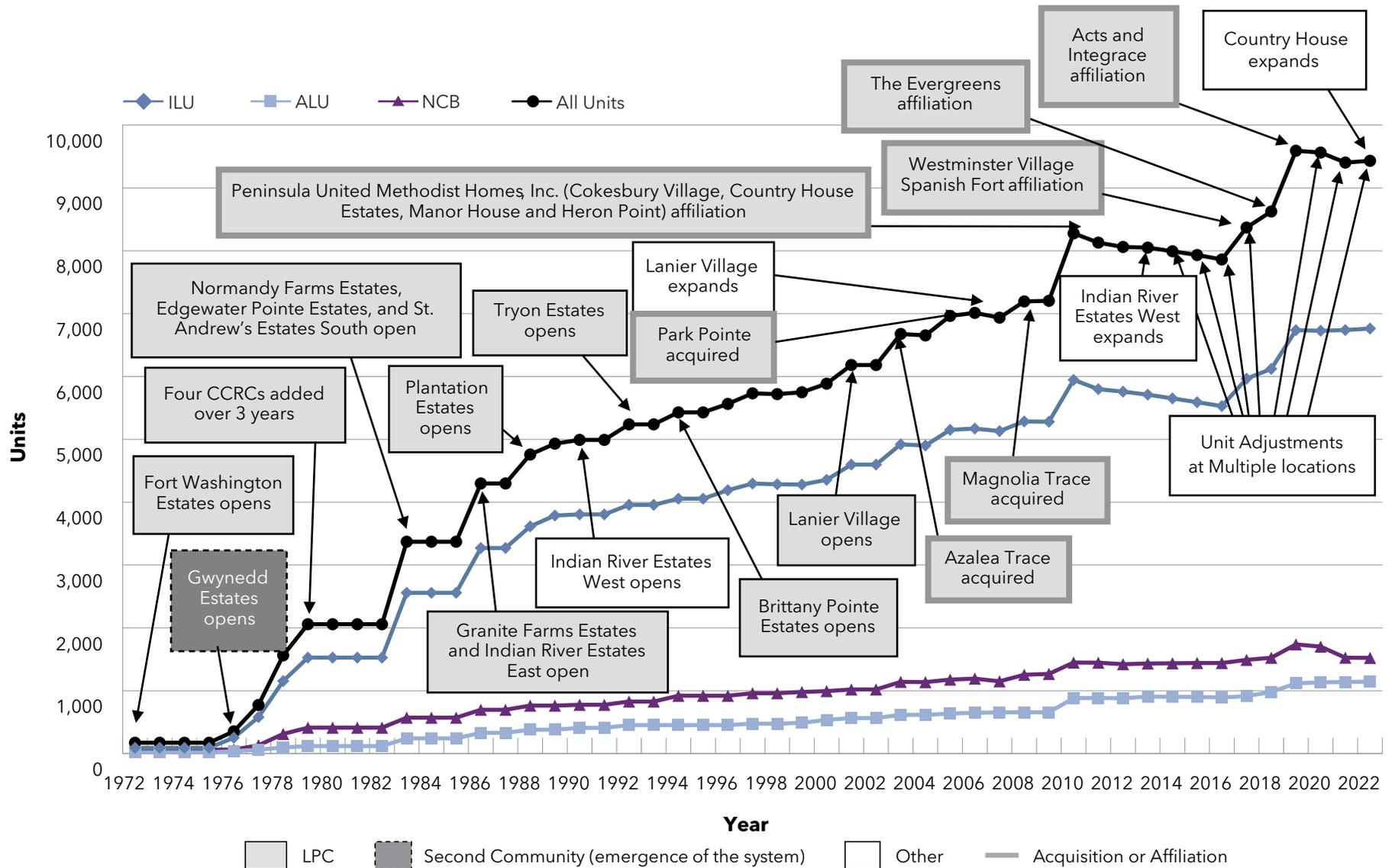
# Growth: Pace of Growth

## Presbyterian Homes and Services (MN)



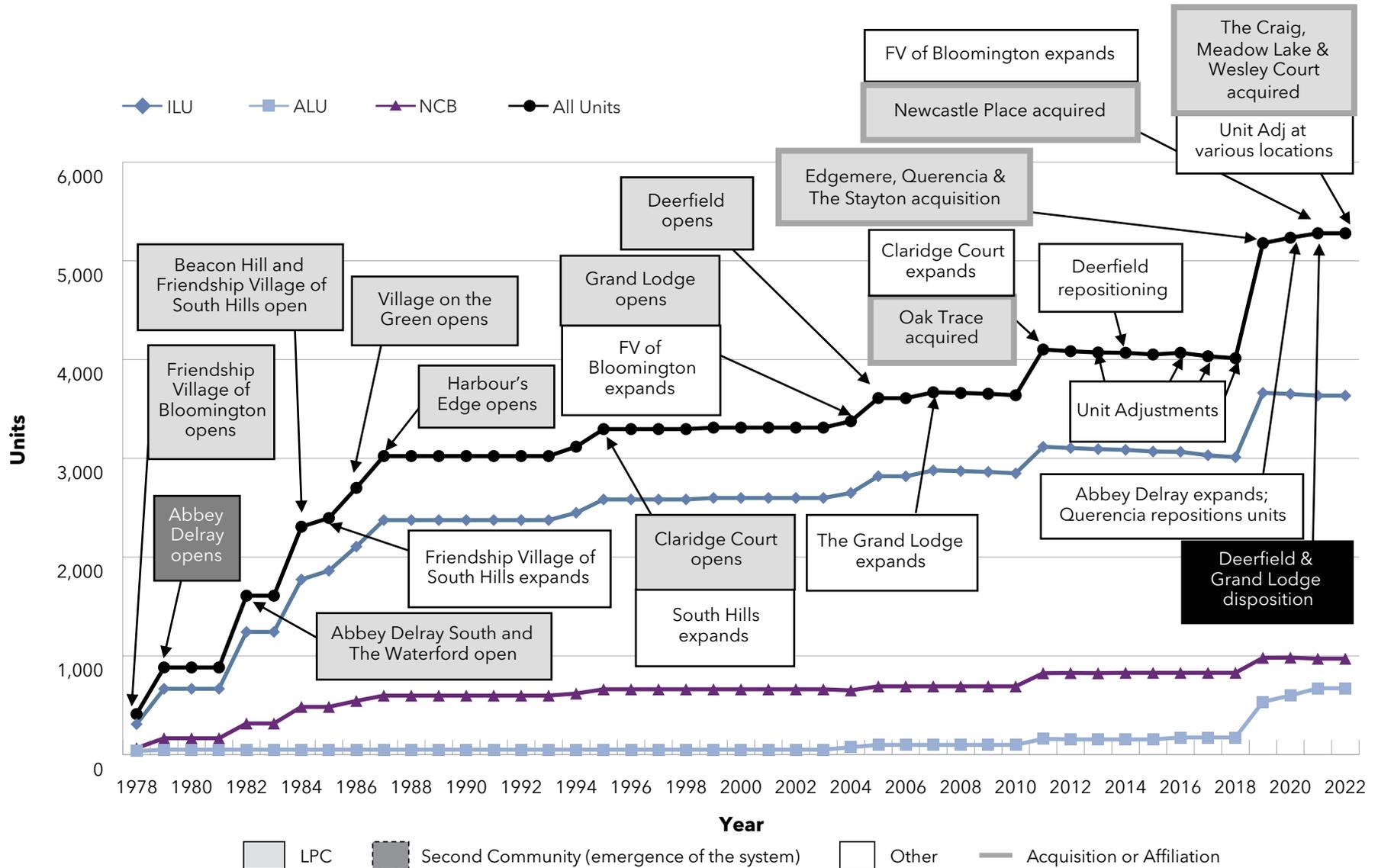
# Growth: Pace of Growth

## Acts Retirement-Life Communities (PA)



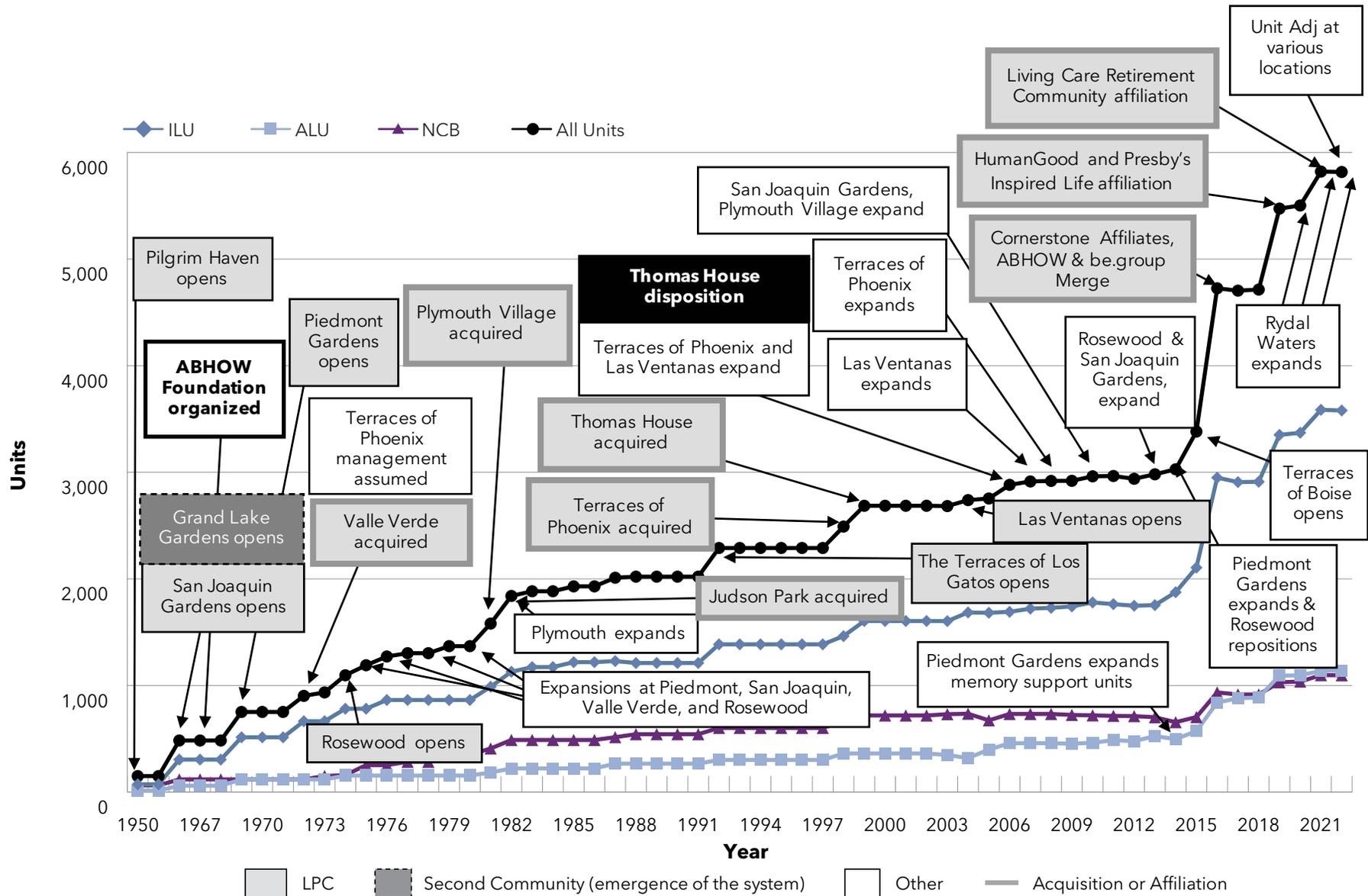
# Growth: Pace of Growth

## Lifespace Communities, Inc. (IA)



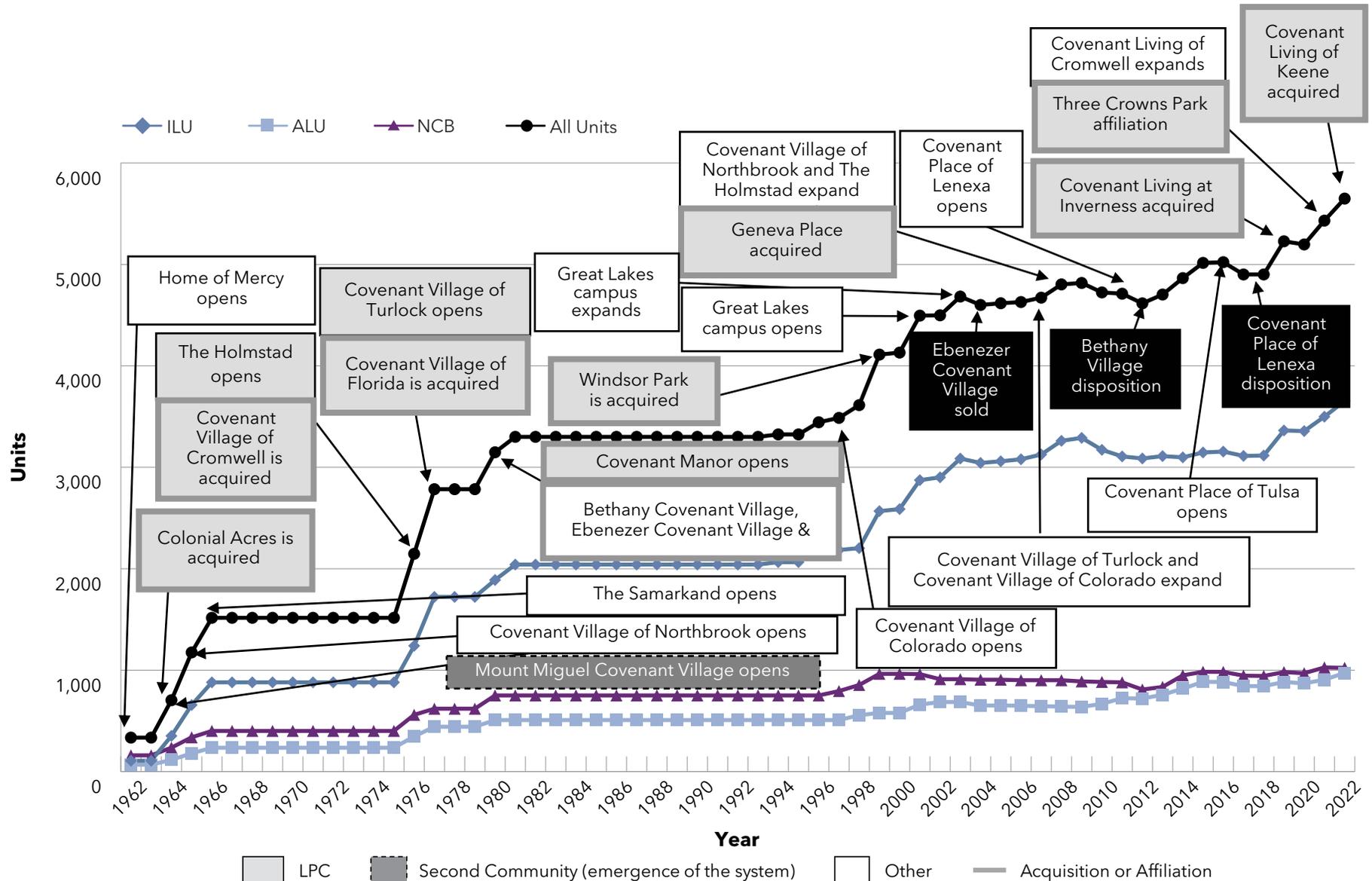
# Growth: Pace of Growth

## HumanGood (CA)



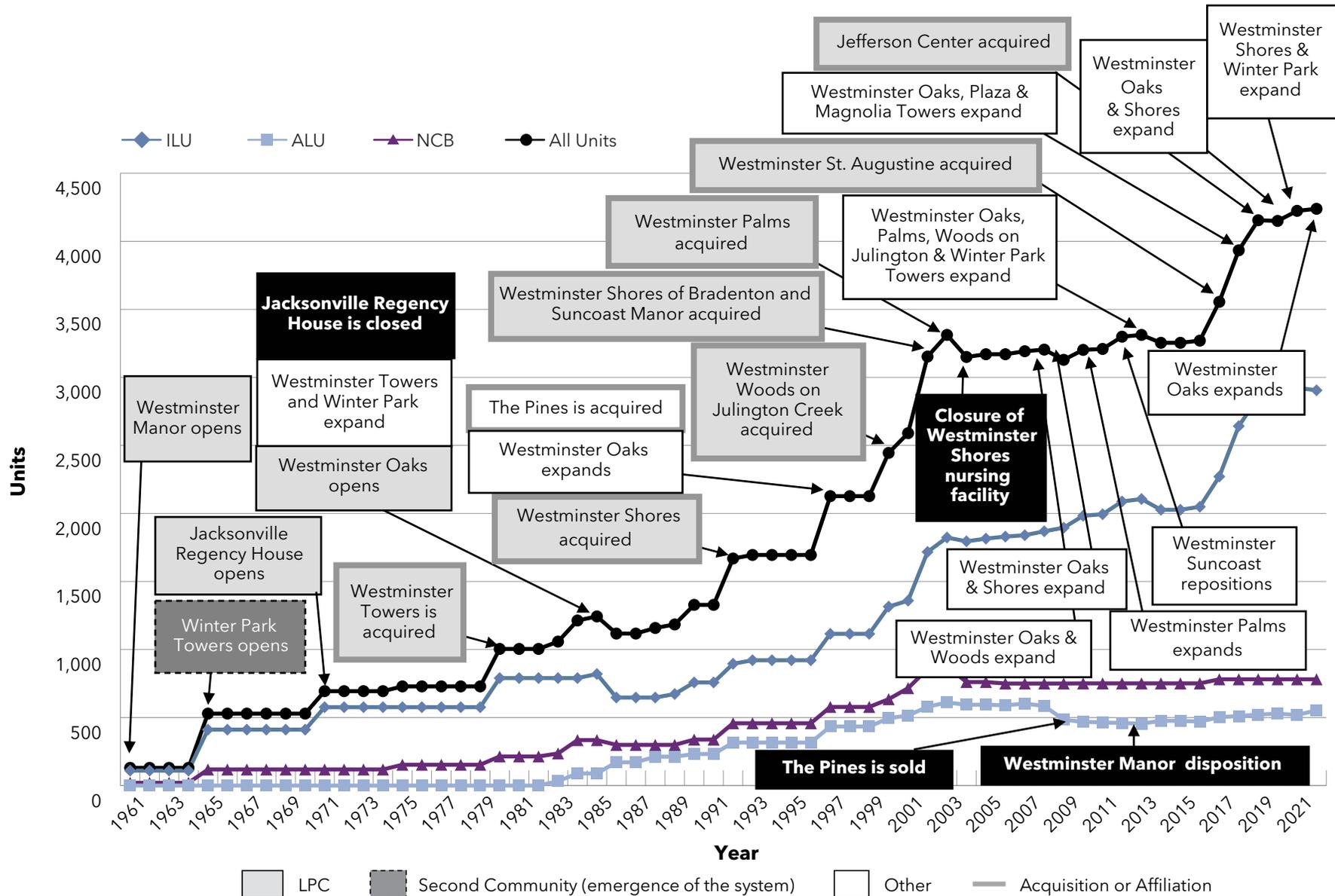
# Growth: Pace of Growth

## Covenant Living Communities & Services (IL)



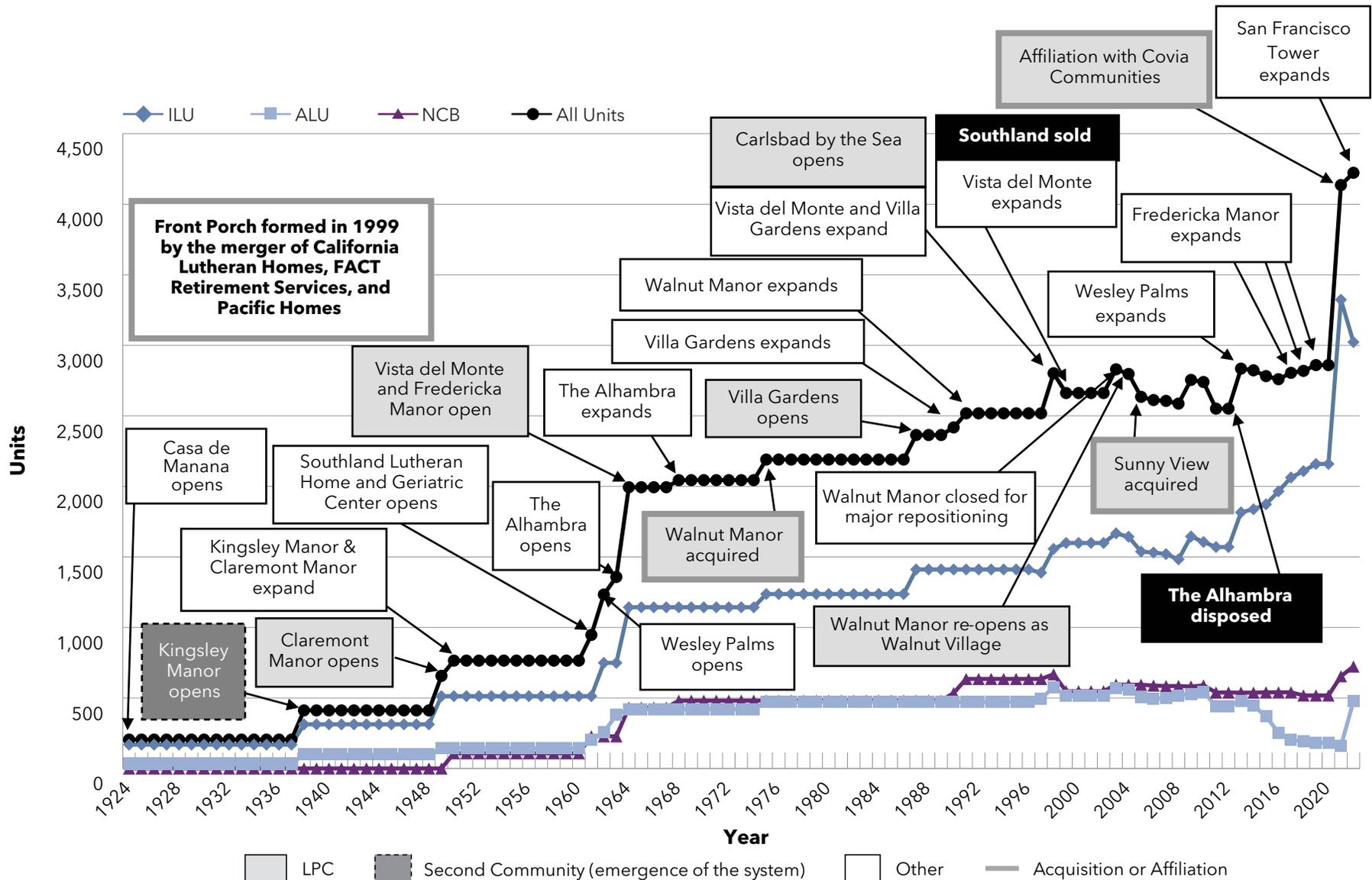
# Growth: Pace of Growth

## Westminster Communities of Florida (FL)

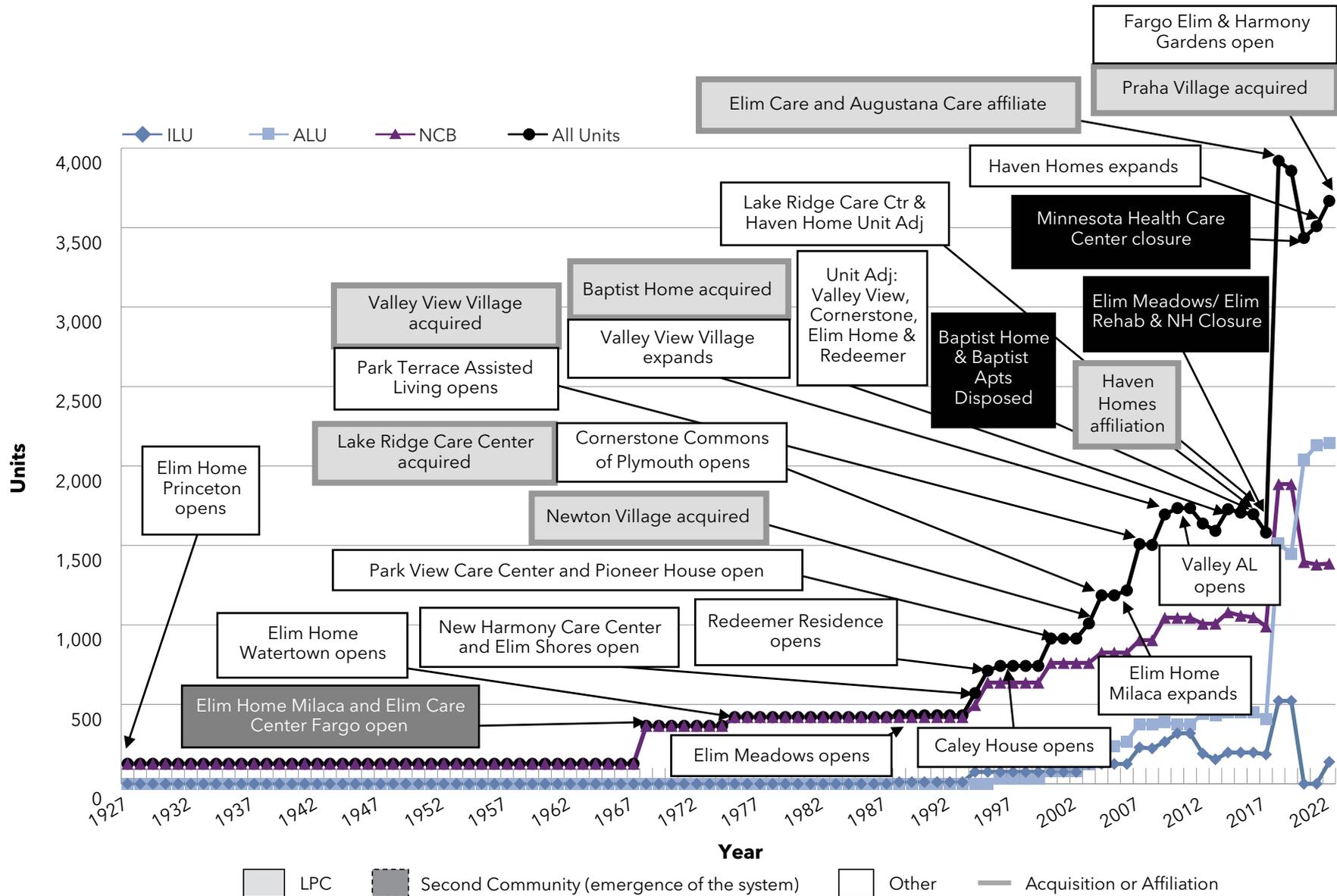


# Growth: Pace of Growth

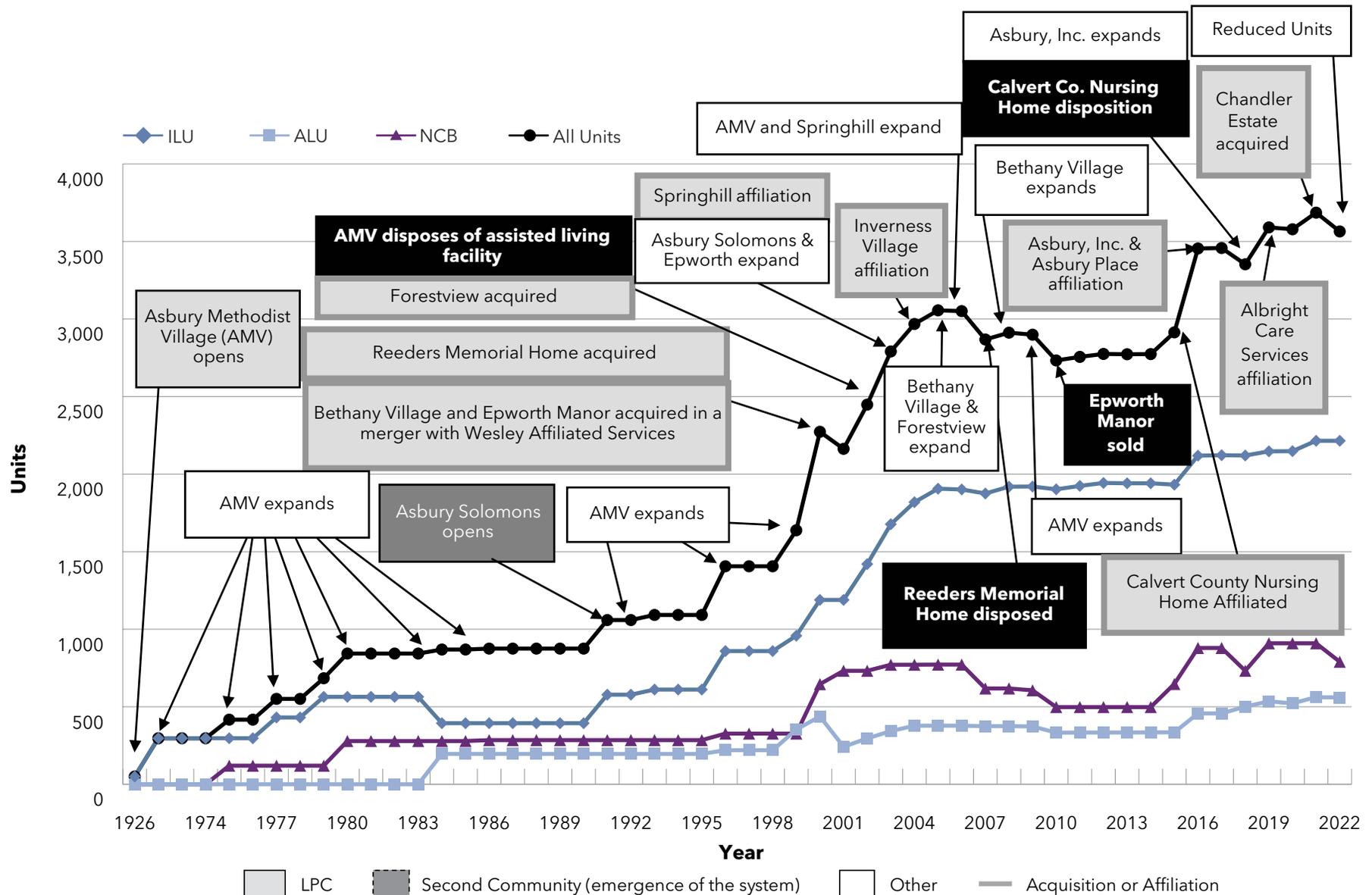
## Front Porch Communities and Services (CA)



# Growth: Pace of Growth Cassia (MN)

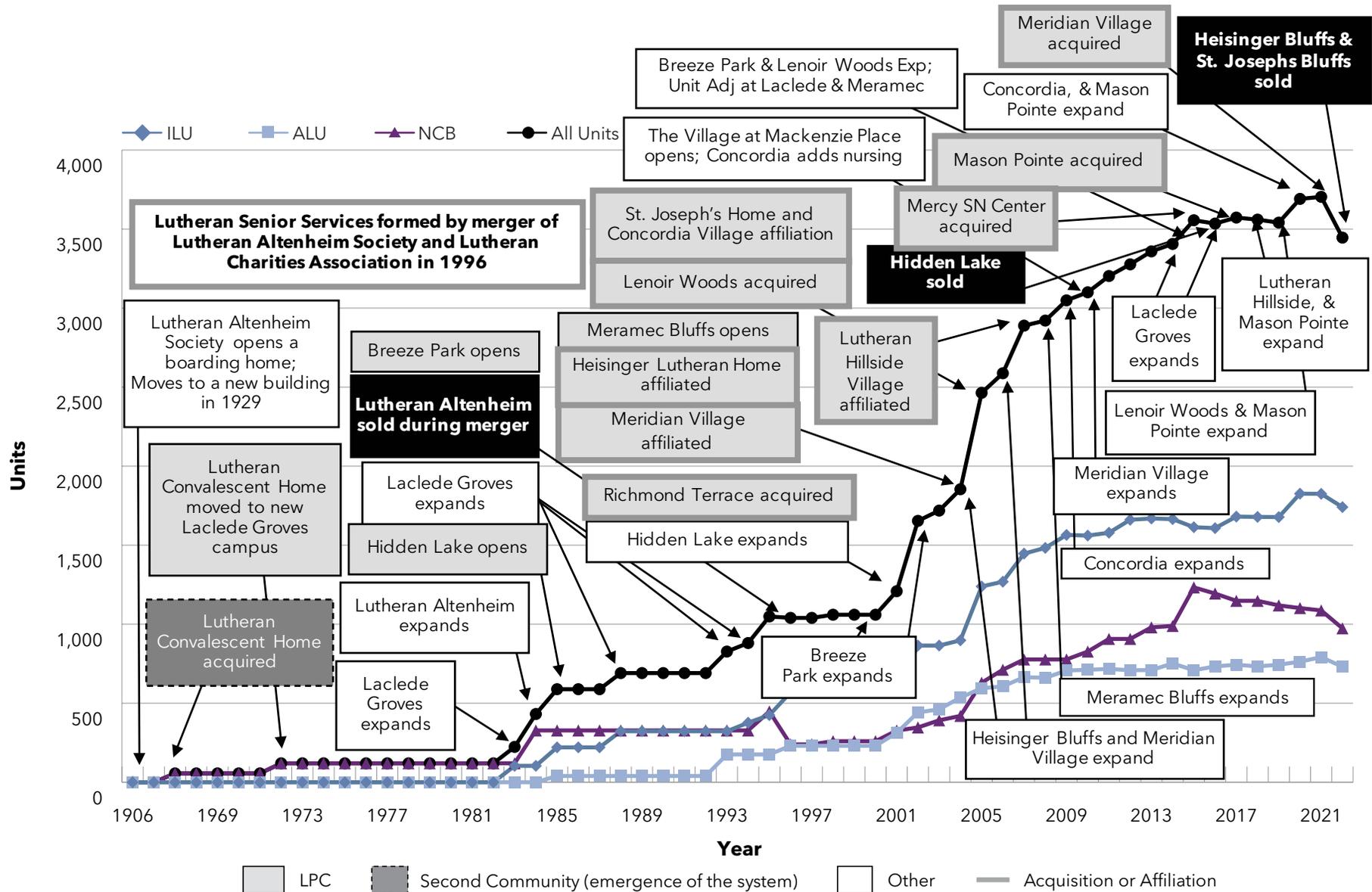


# Growth: Pace of Growth Asbury Communities (MD)



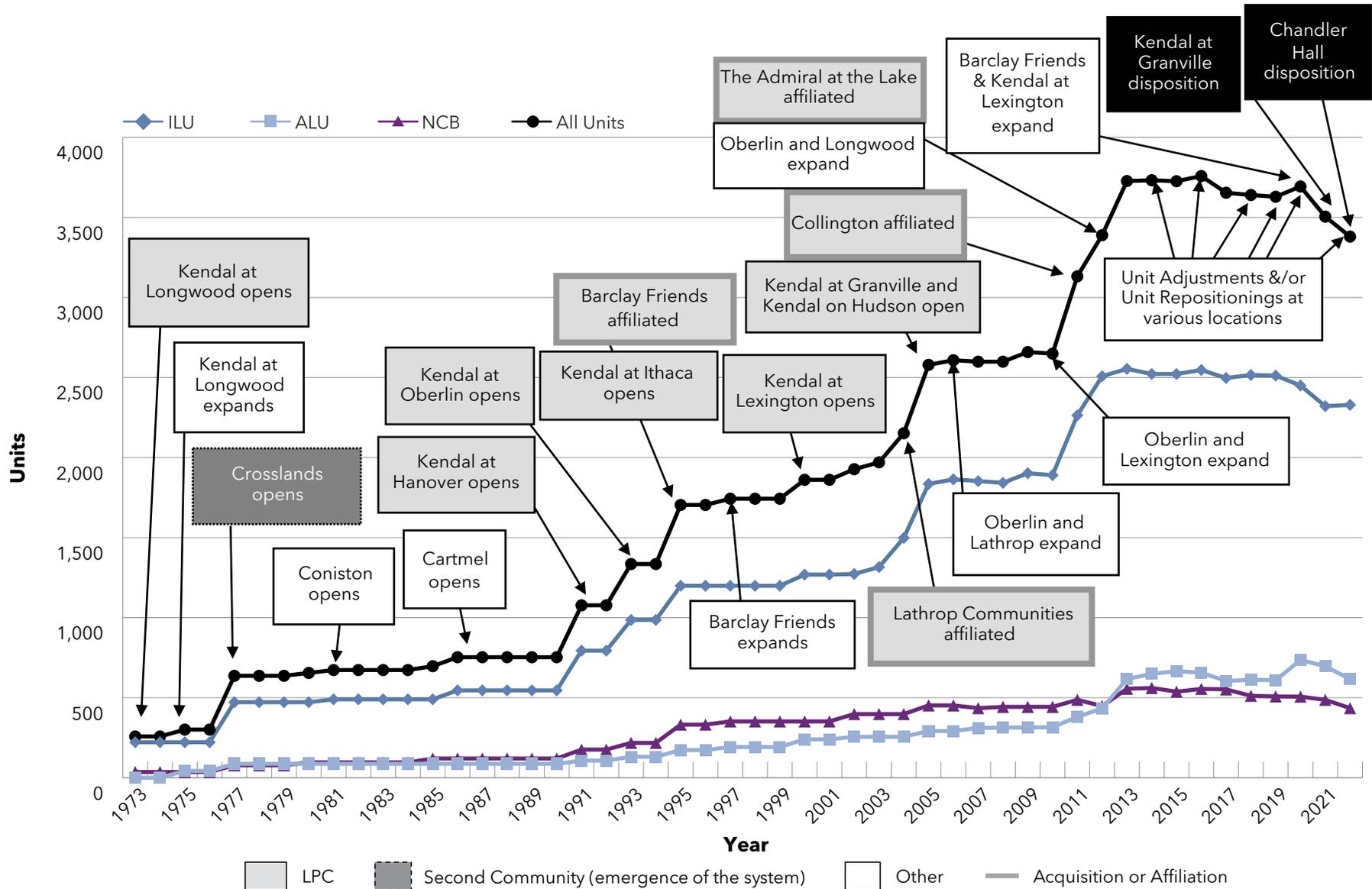
# Growth: Pace of Growth

## Lutheran Senior Services (MO)



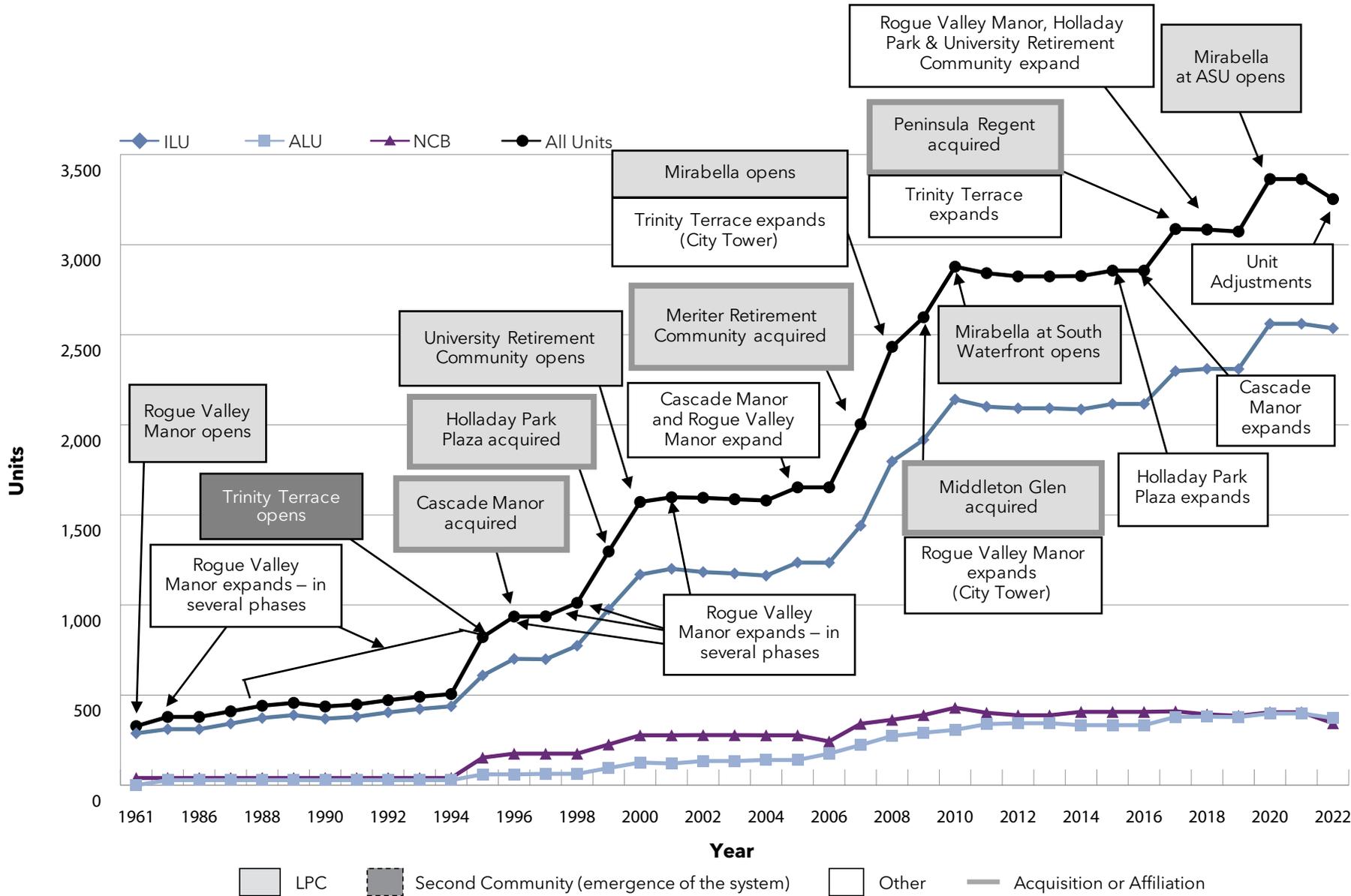
# Growth: Pace of Growth

## The Kendal Corporation (PA)



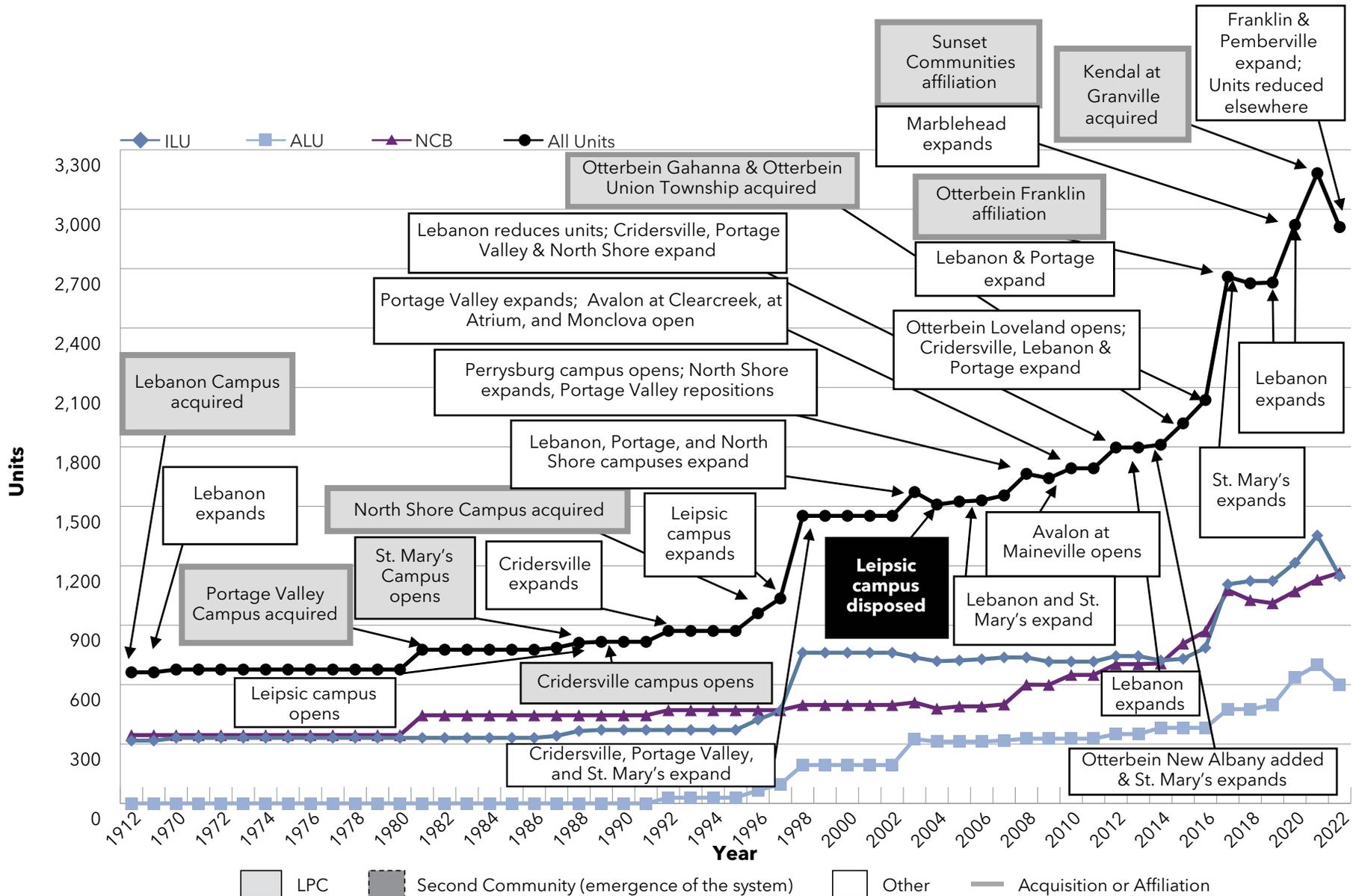
# Growth: Pace of Growth

## Pacific Retirement Services (OR)



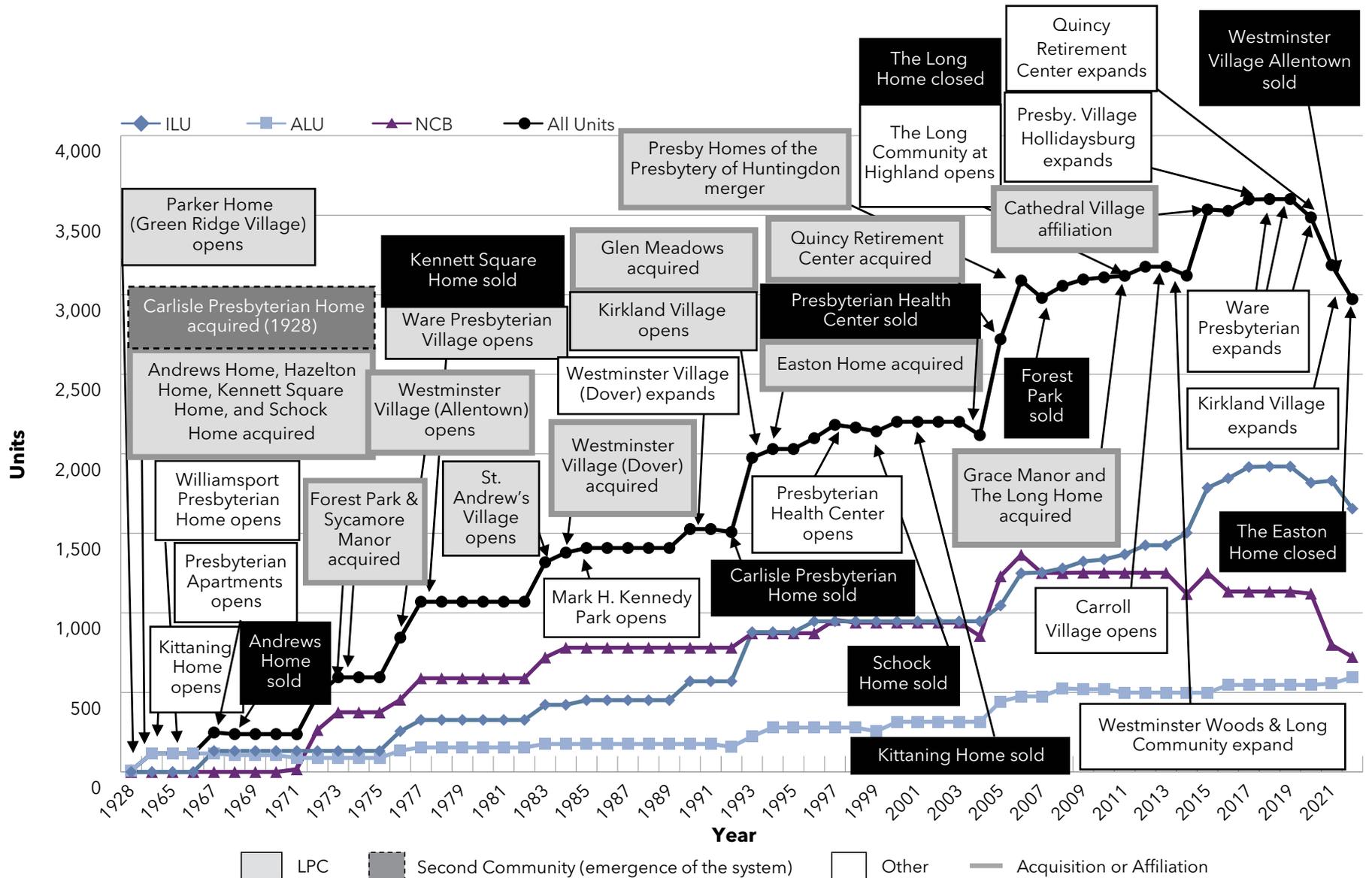
# Growth: Pace of Growth

## Otterbein SeniorLife (OH)



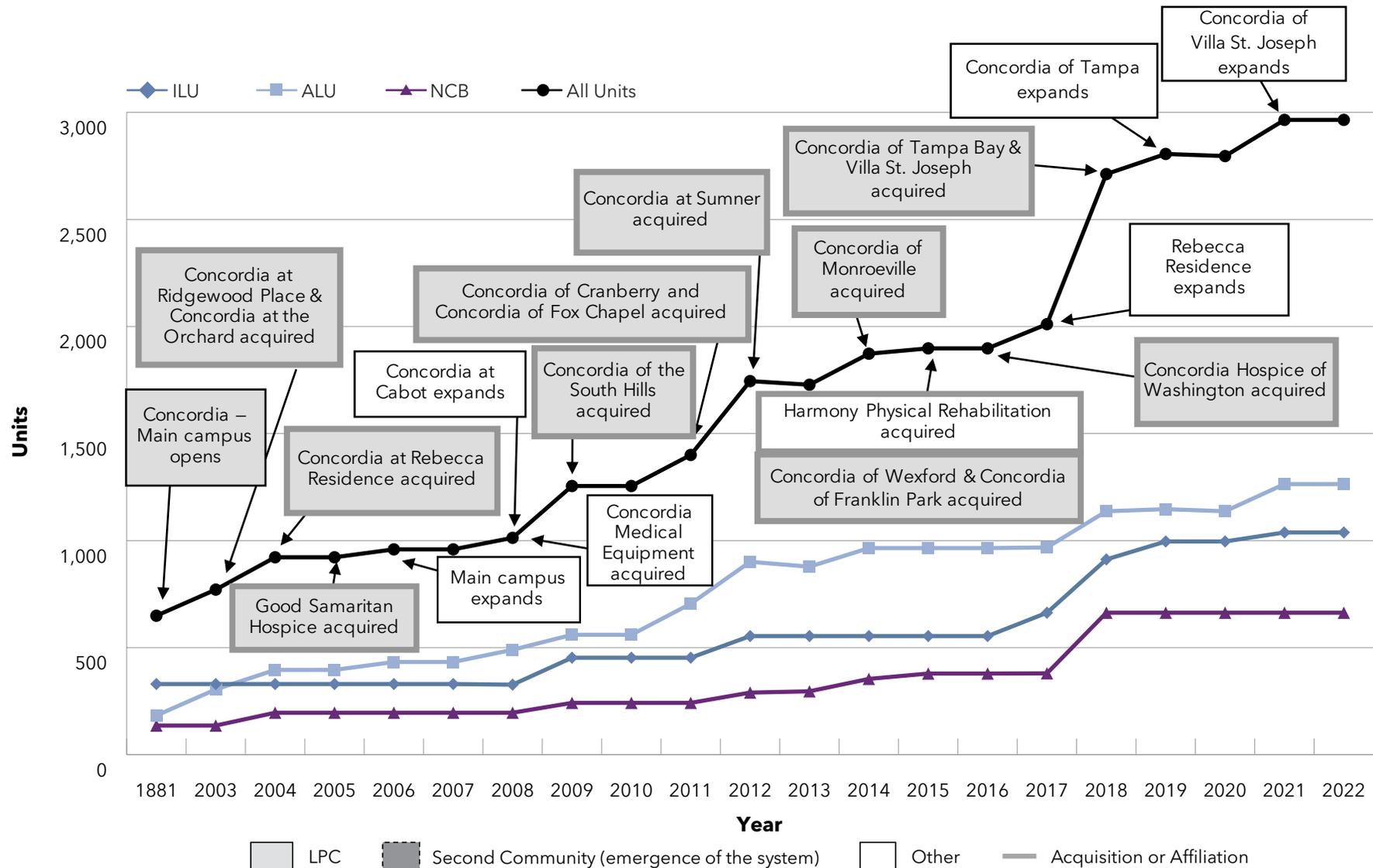
# Growth: Pace of Growth

## Presbyterian Senior Living (PA)



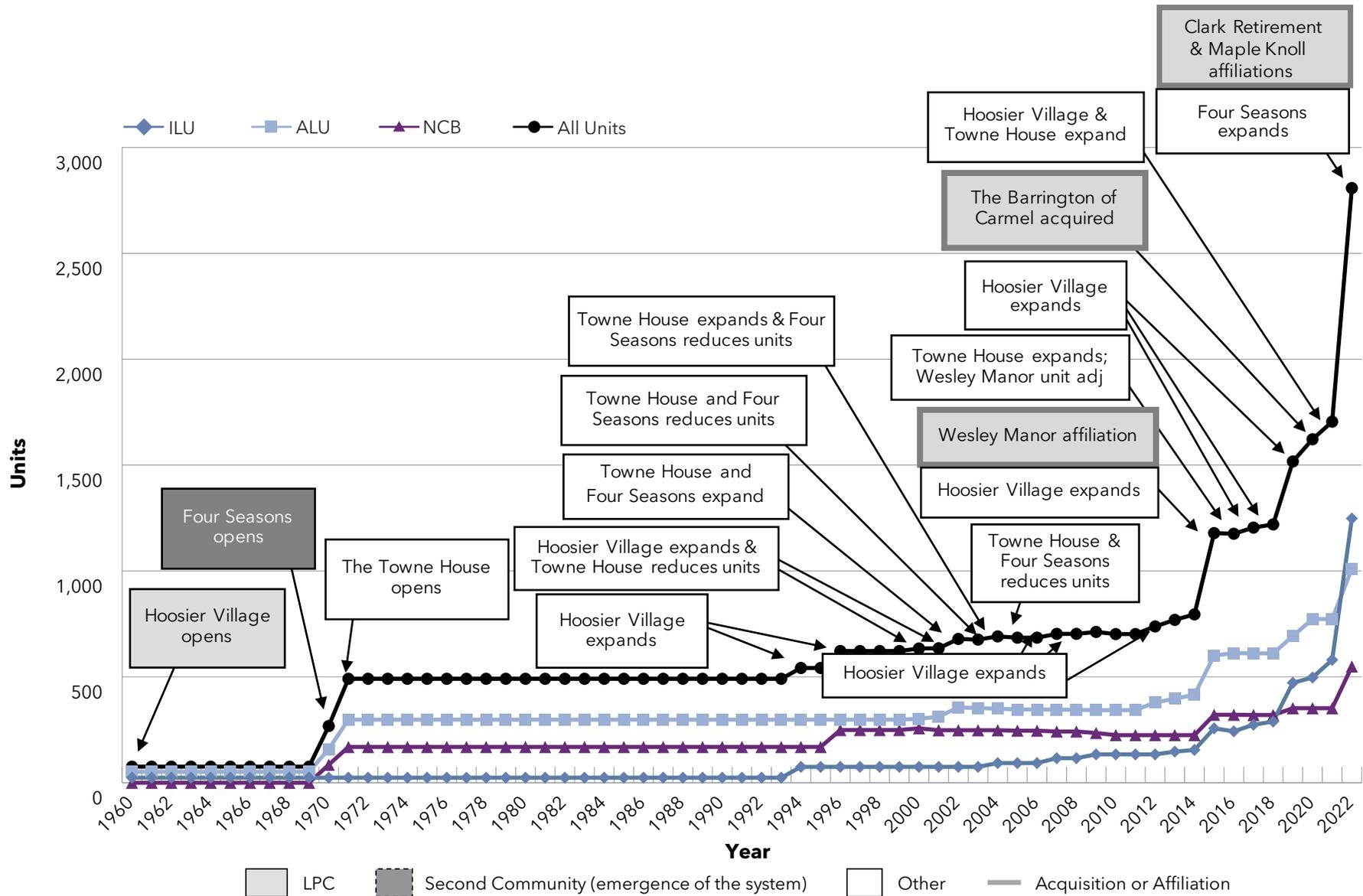
# Growth: Pace of Growth

## Concordia Lutheran Ministries (PA)



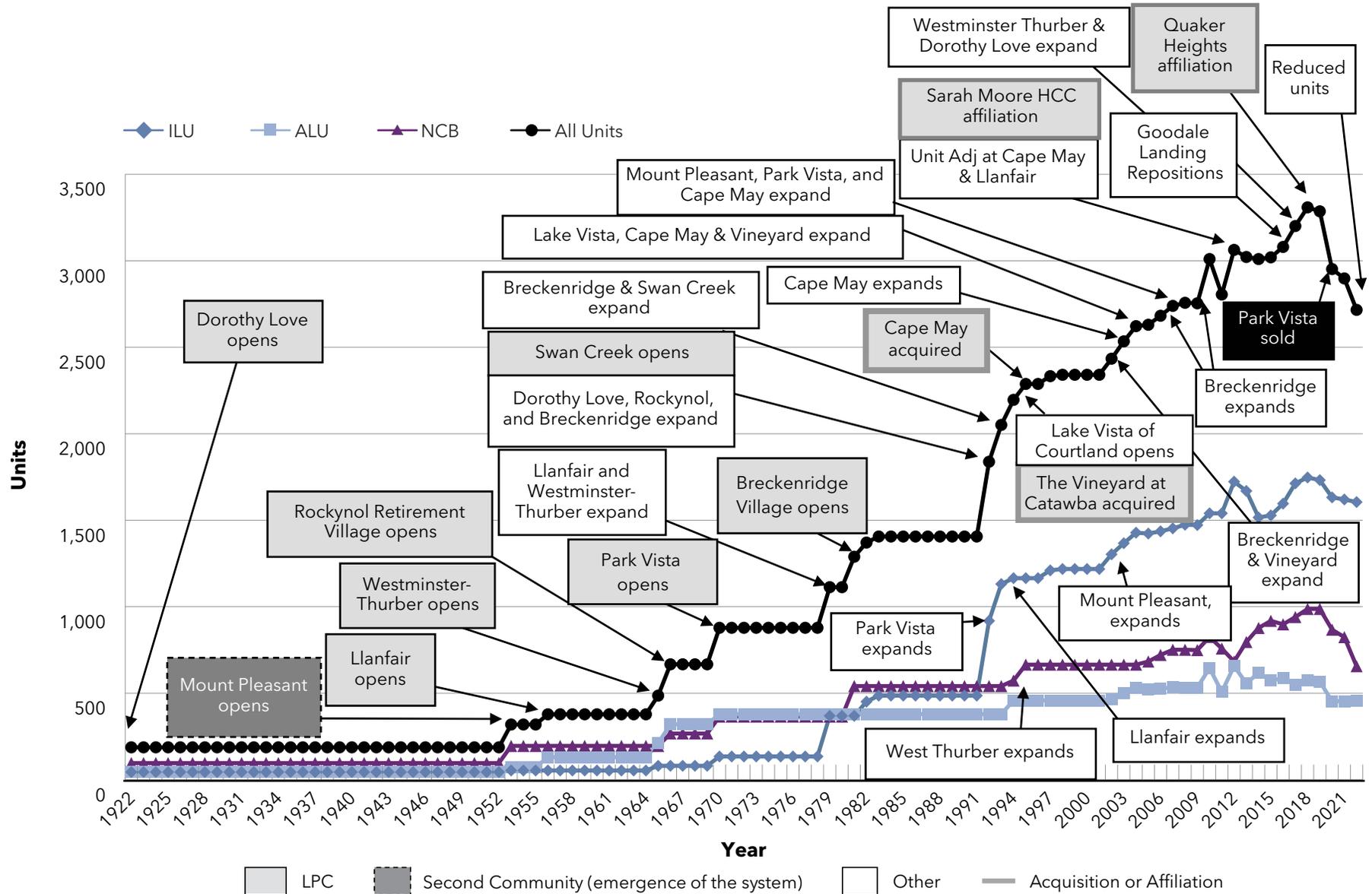
# Growth: Pace of Growth

## BHI Senior Living (IN)



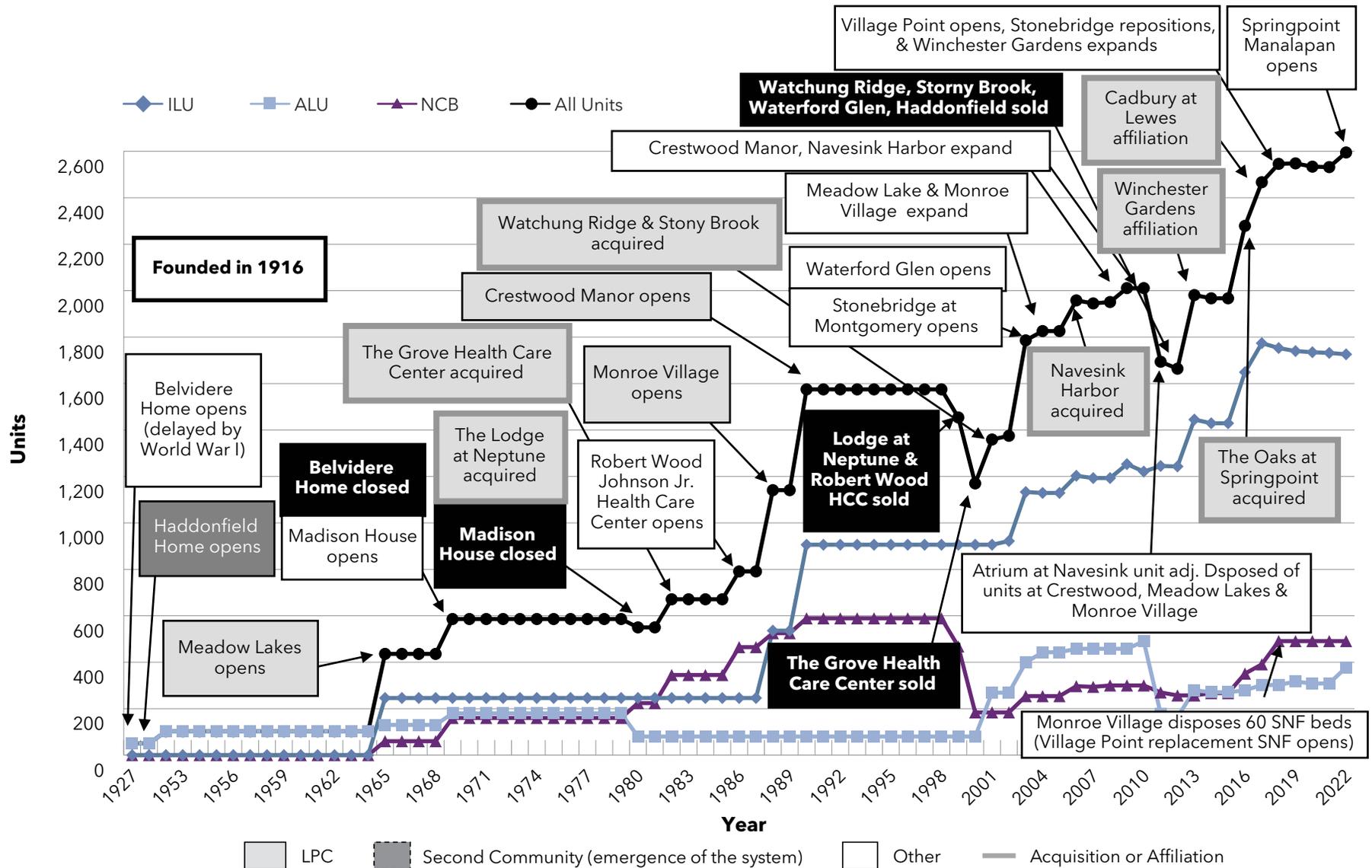
# Growth: Pace of Growth

## Ohio Living (OH)



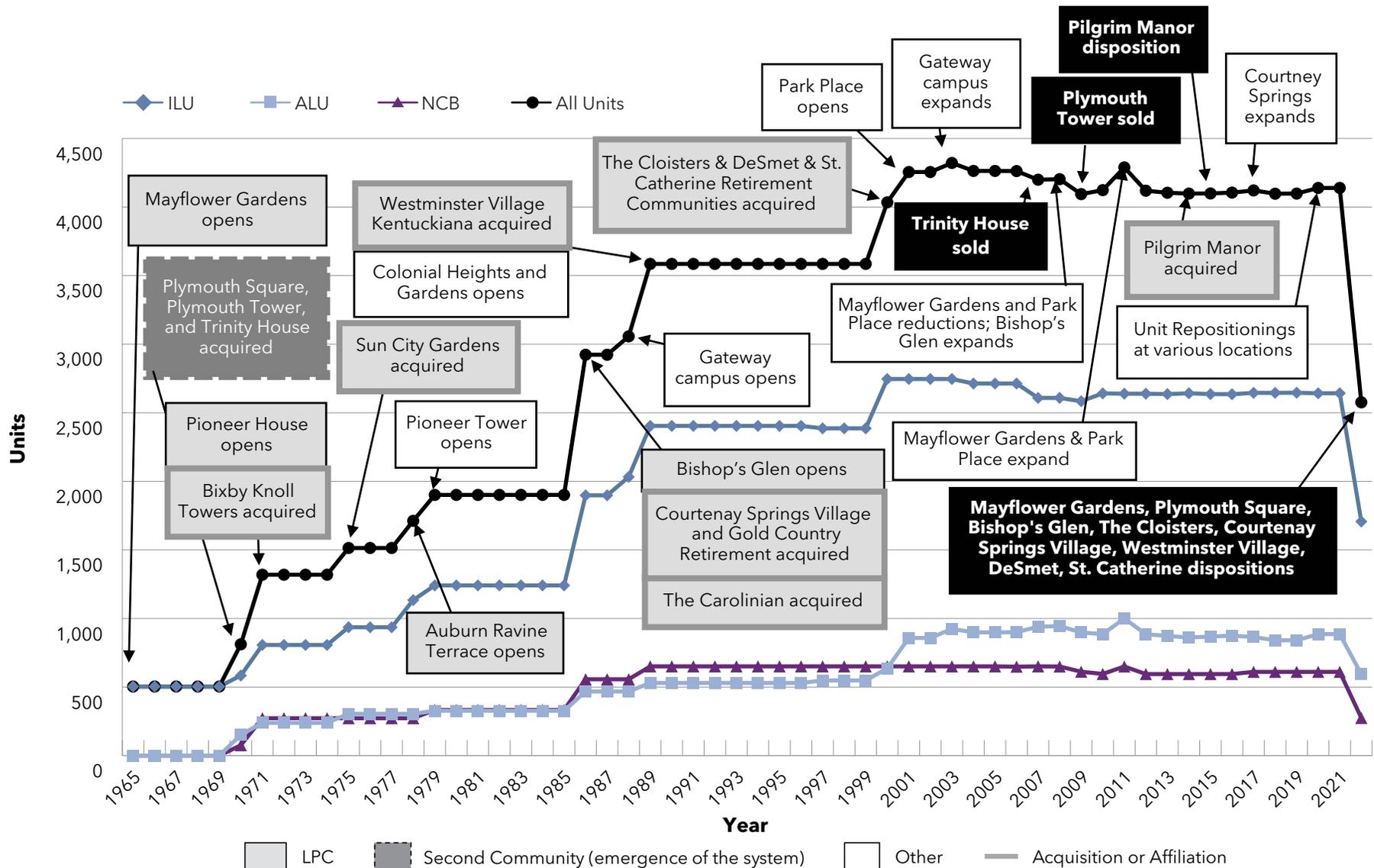
# Growth: Pace of Growth

## Springpoint (NJ)



# Growth: Pace of Growth

## Retirement Housing Foundation (CA)



## 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 2021 and 2022, 2000 and 2022, and 1990 and 2022 (Charts 5-3a-c).

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



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

2023 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/22)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2022 (n=200)						
22	BHI Senior Living	IN	39.28%	64.69%	1,103	2,808
44	Life Enriching Communities	OH	38.37%	72.00%	647	2,078
40	Lutheran Services Carolinas	NC	23.85%	60.33%	419	3,182
30	Bethesda Senior Living Communities	CO	21.37%	68.31%	464	2,965
51	Methodist Retirement Communities	TX	15.04%	48.81%	233	1,549
Growth from 2000 to 2022 (n=175)						
1	National Senior Communities	VA	736.85%	11.08%	206	21,959
27	Transforming Age	WA	600.55%	9.89%	0	2,543
146	Smith Senior Living	IL	591.30%	9.80%	0	636
34	National Church Residences	OH	371.20%	7.15%	0	2,078
20	Concordia Lutheran Ministries	PA	356.86%	6.92%	0	2,965
Growth from 1990 to 2022 (n=193)						
3	Presbyterian Homes and Services	MN	1,083.56%	8.56%	255	9,646
100	Givens Communities	NC	882.61%	7.80%	35	904
146	Smith Senior Living	IL	748.00%	7.19%	0	636
84	Lutheran Homes of South Carolina	SC	652.99%	6.68%	-9	1,009
17	Pacific Retirement Services	OR	611.82%	6.44%	-111	3,253

\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization. Average Annual Growth was calculated by finding the geometric mean over the period (1, 20, or 30 years).

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

2023 Rank	System Name	State	Growth*		Total Units (as of 12/31/22)
			Units Added	Average Annual Growth (%)	
Growth in 2022 (n=200)					
22	BHI Senior Living	IN	1,103	39.28%	2,808
6	Lifespace Communities	IA	679	11.40%	5,958
44	Life Enriching Communities	OH	647	38.37%	1,686
30	Bethesda Senior Living Communities	CO	464	21.37%	2,171
40	Lutheran Services Carolinas	NC	419	23.85%	1,757
Growth from 2000 to 2022 (n=174)					
1	National Senior Communities	VA	19,335	736.85%	21,959
3	Presbyterian Homes and Services	MN	6,965	259.79%	9,646
4	Acts Retirement-Life Communities, Inc.	PA	3,683	64.06%	9,432
7	HumanGood	CA	3,131	116.57%	5,817
6	Lifespace Communities	IA	2,647	79.95%	5,958
Growth from 1990 to 2022 (n=192)					
1	National Senior Communities	VA	n/a**	n/a**	21,959
3	Presbyterian Homes and Services	MN	8,831	1083.56%	9,646
4	Acts Retirement-Life Communities, Inc.	PA	4,501	91.28%	9,432
7	HumanGood	CA	3,796	187.83%	5,817
11	Westminster Retirement Communities of Florida	FL	3,055	258.02%	4,239

\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization. Average Annual Growth was calculated by finding the geometric mean over the period (1, 20, or 30 years).

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

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

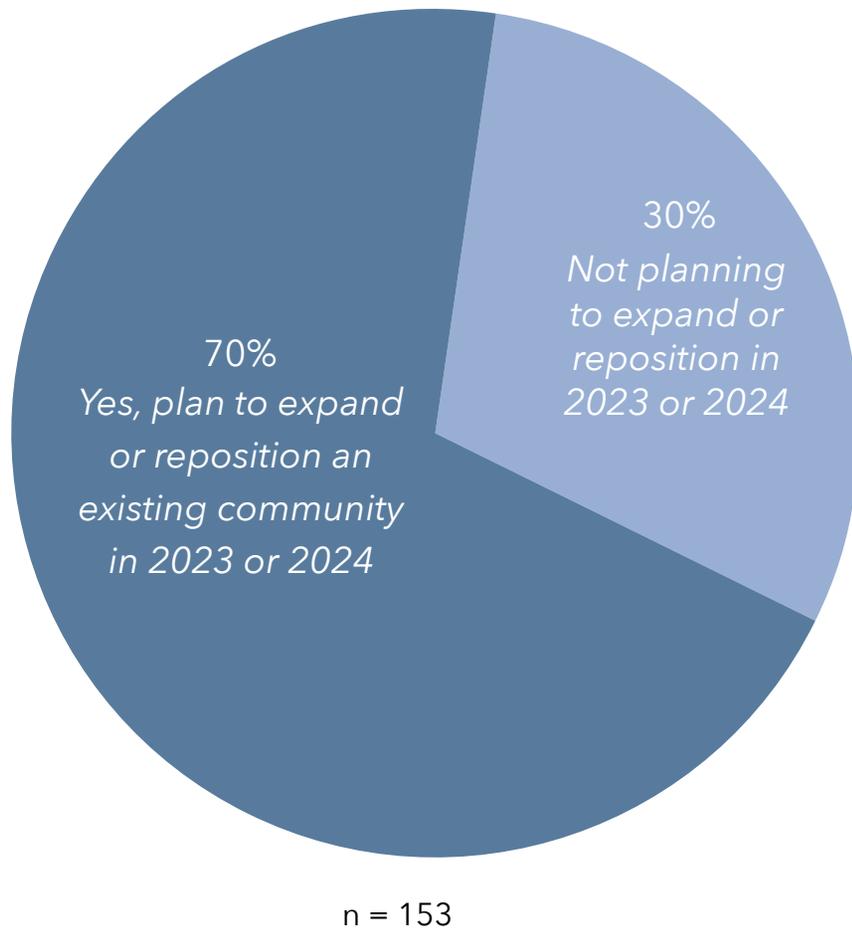
2023 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/22)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2022 (n=35)						
22	BHI Senior Living	IN	39.28%	64.69%	1,103	2,808
6	Lifespace Communities	IA	11.40%	12.86%	679	5,958
30	Bethesda Senior Living Communities	CO	11.40%	27.18%	464	2,171
3	Presbyterian Homes and Services	MN	2.64%	2.72%	255	9,646
8	Covenant Living Communities	IL	3.84%	3.99%	217	5,649
Growth from 2000 to 2022 (n=35)						
1	National Senior Communities	VA	736.85%	11.08%	206	21,959
27	Transforming Age	WA	600.55%	9.89%	0	2,543
34	National Church Residences	OH	371.20%	7.15%	0	2,078
20	Concordia Lutheran Ministries	PA	356.86%	6.92%	0	2,965
22	BHI Senior Living	IN	342.90%	6.70%	1,103	2,808
Growth from 1990 to 2022 (n=35)						
1	National Senior Communities	VA	n/a**	n/a**	206	21,959
3	Presbyterian Homes and Services	MN	1,083.56%	8.56%	255	9,391
31	Christian Care Companies	AZ	565.85%	6.16%	0	2,164
22	BHI Senior Living	IN	471.89%	5.50%	1,103	2,808
27	Transforming Age	WA	468.90%	5.47%	0	2,543

\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization. Average Annual Growth was calculated by finding the geometric mean over the period (1, 20, or 30 years).

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

## Growth: Future Growth Plans

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

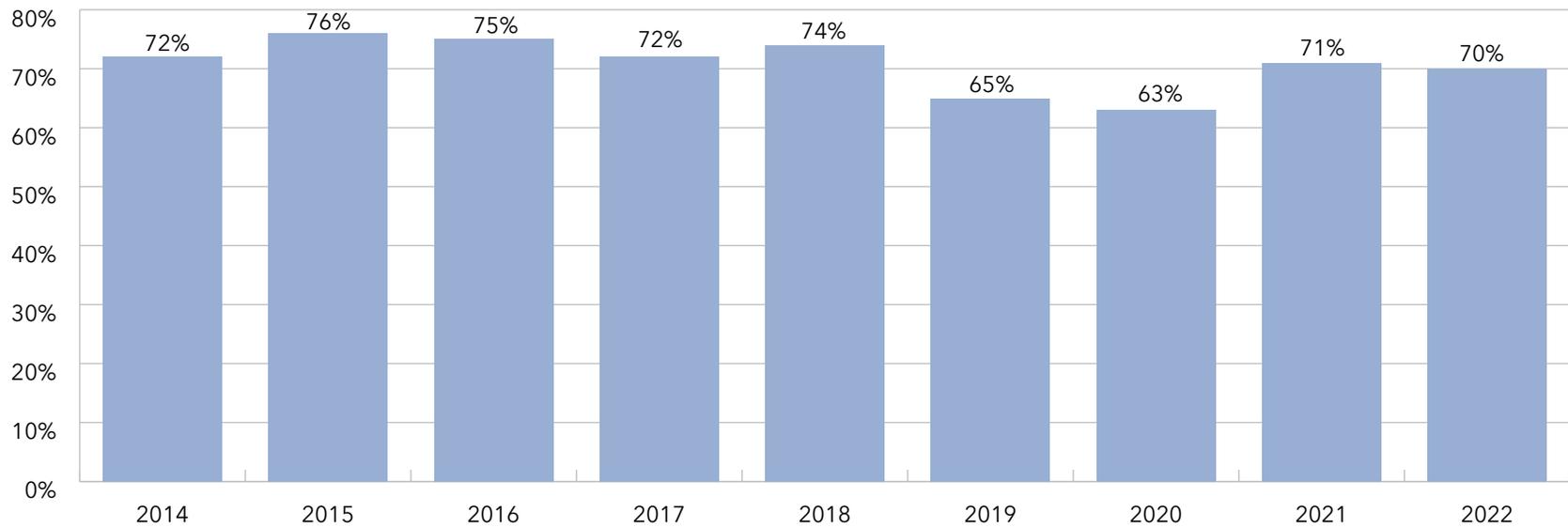


#### *Future Growth Plans*

Arguably, much information can be gathered about potential future growth, whether it would be in the form of bricks-and-mortar or expanding home and community-based services. For purposes of the LZ 200, feedback is gathered on the intent to grow through affiliation, new campus development, or expansion in the next two years. Roughly 71% of the LZ 200 reported intentions to expand or reposition an existing campus in 2023 or 2024. Roughly 16% reported that they intend to grow via the construction of new communities while 33% responded 'maybe' to this type of growth in 2023 or 2024. Another 12% reported that they intend to grow from affiliation while 25% may consider affiliation in 2023 or 2024.

## Growth: Future Growth Plans

Percentage Planned Expansions or Repositions Since 2014

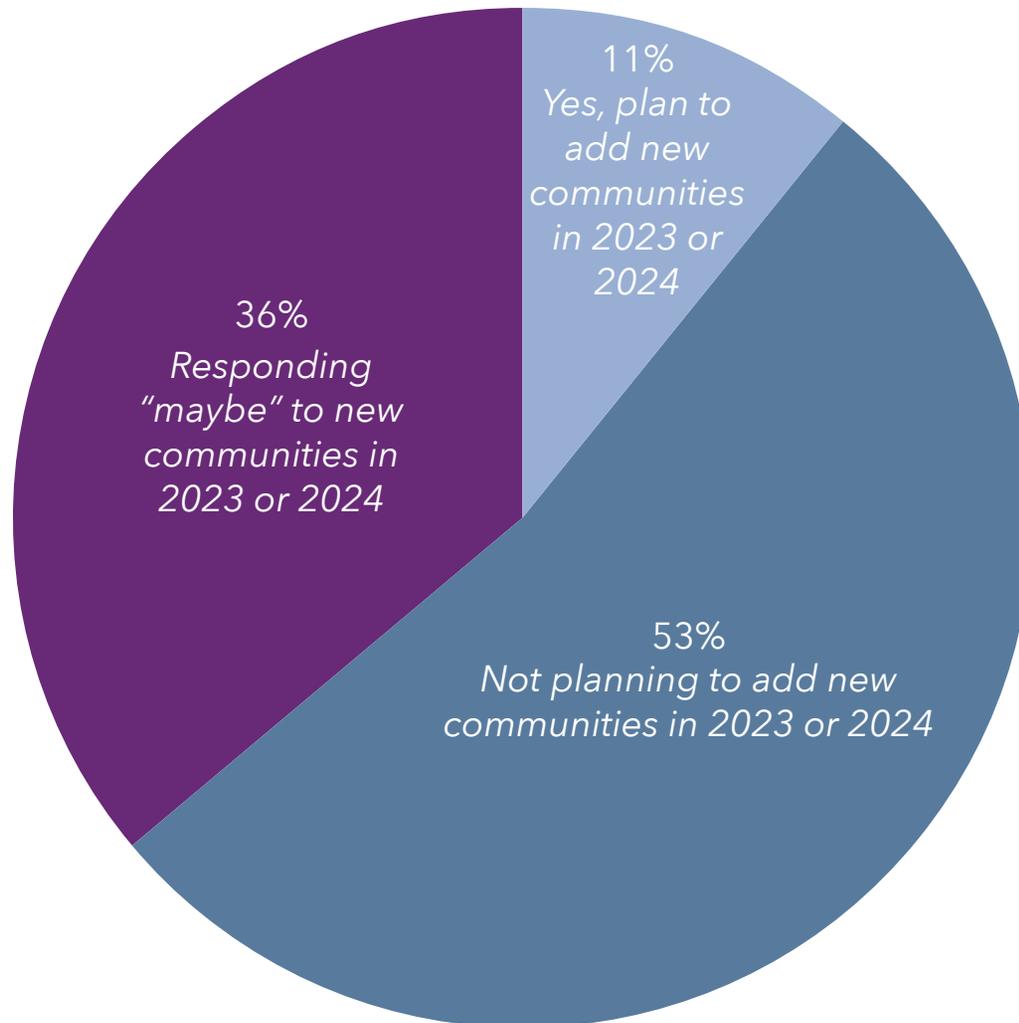


KEY: ■ Yes, plan to expand or reposition an existing community

n = 153

## Growth: Future Growth Plans

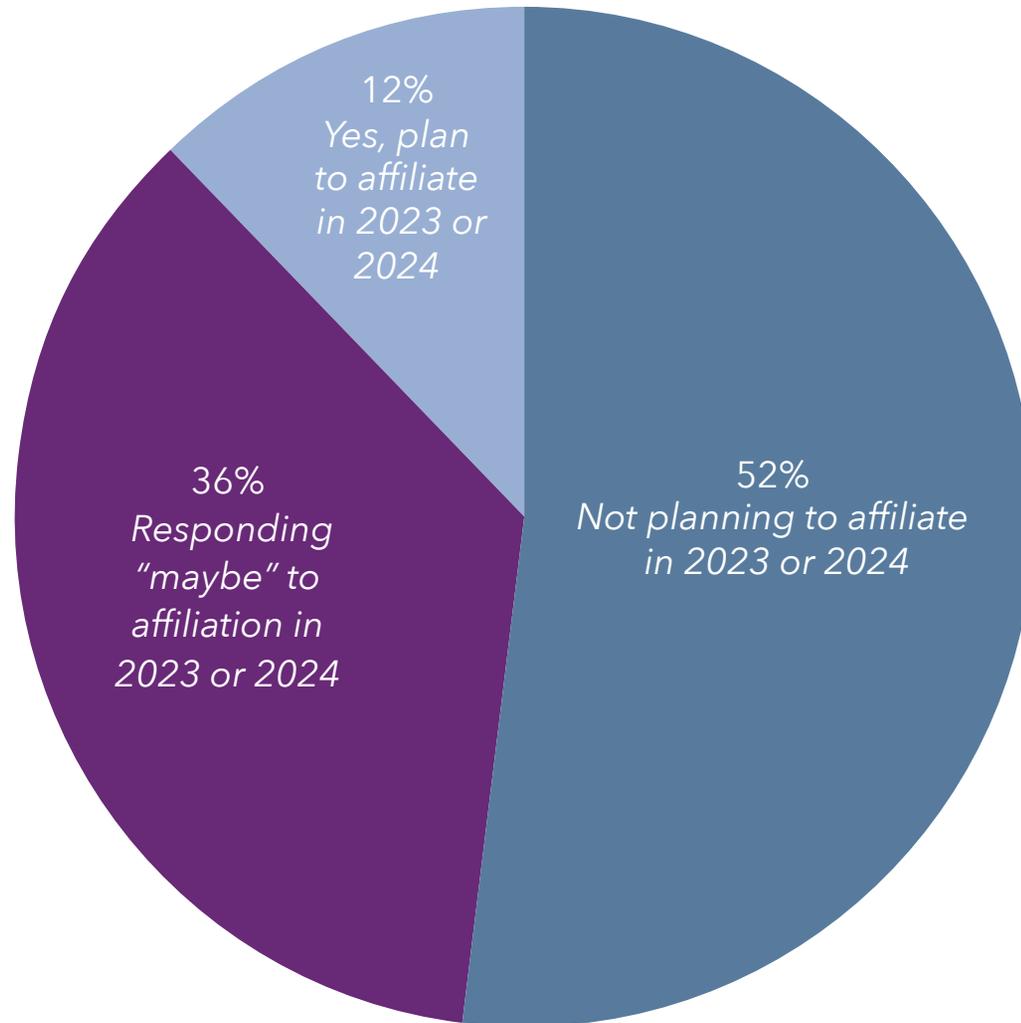
Percentage Planning to Add A New Community Through Development or Affiliation



N= 136

# Growth: Future Growth Plans

## Percentage Planning to Grow Through Affiliation



N= 153

## Growth: Type of Growth by Organizations

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

Charts 5-6a-c and 5-7a-l describe how the largest 10, the largest 25, the largest 50 multi-sites, and all 200 multi-site organizations have grown through expanding existing campuses, construction of new communities or merger/acquisition/affiliation and/or disposition. Properties have been classified according to the following definitions:

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

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

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

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

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

The charts at 5-6a-c analyze how communities have changed through the above-described venues over a 10, 20, and greater than 30-year period (1980-2022). More than 1,450 communities have been added from campus expansion since 1980 (Chart 5-6a). Dispositions have also increased dramatically. Of the 312 community dispositions that occurred from 1980-2022 among the LZ 200 (Chart 5-6a), roughly 295 of these dispositions occurred in approximately the last decade (Chart 5-6c). The most common dispositions in recent years have been free-standing nursing homes or assisted living and financially distressed Life Plan Communities.

Charts 5-7a-l are used to present incremental growth by five-year period and cumulative growth by five-year period for each of the LZ 200 groupings (the largest 10, the largest 25, the largest 50, the largest 100, the largest 150, and the largest 200). The second of each pair of charts shows the incremental change of the multi-sites, that is, how many existing properties have experienced expansion; how many properties have been added

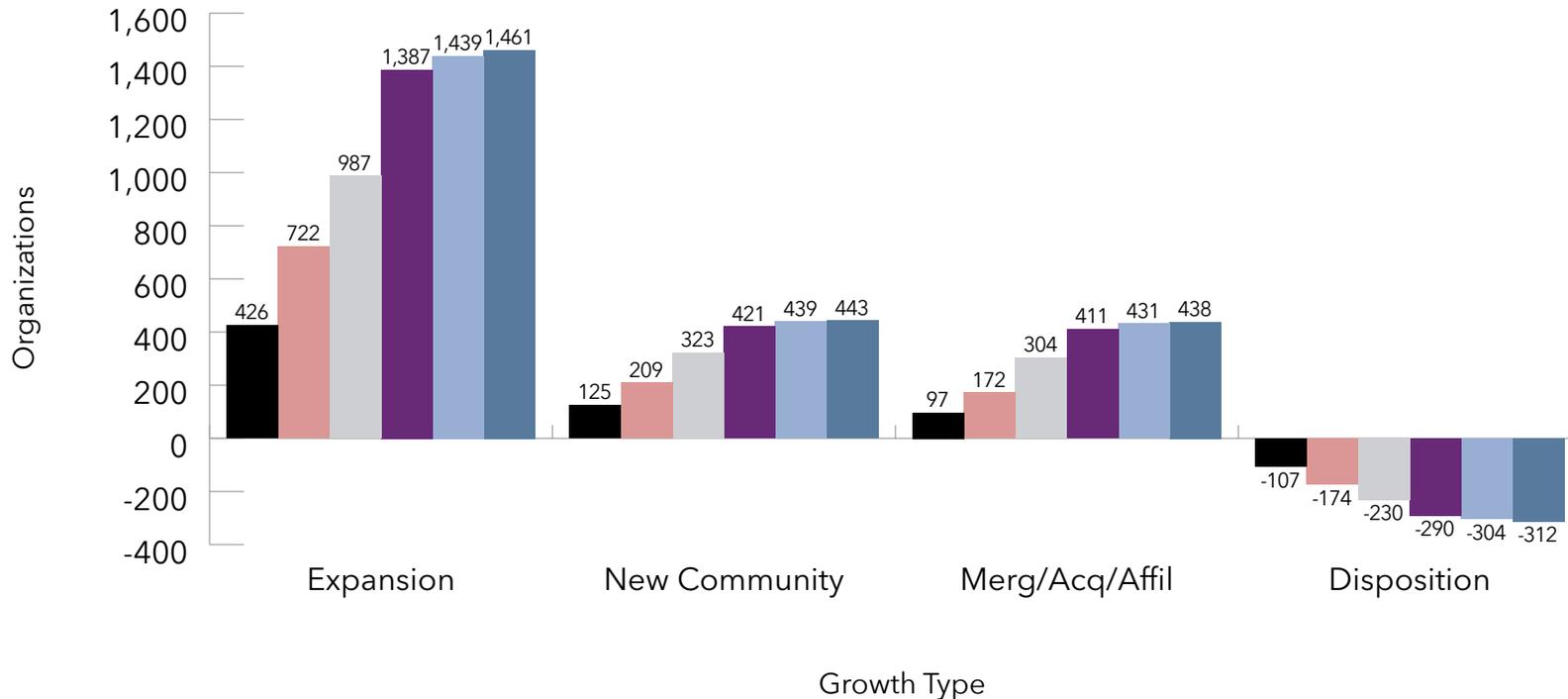
## Growth: Type of Growth by Organizations

through new community construction or through merger, acquisition and/or affiliation; and how many properties have been lost through disposition each year. For the incremental growth charts, the final five-year period is provided with the current year shown alone. The cumulative growth charts provide the number of properties added or lost through each of these methods through the period shown.



# Growth: Type of Growth by Organizations

Number of Organizations Changing, by Growth Type, 1980 through 2022



**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.

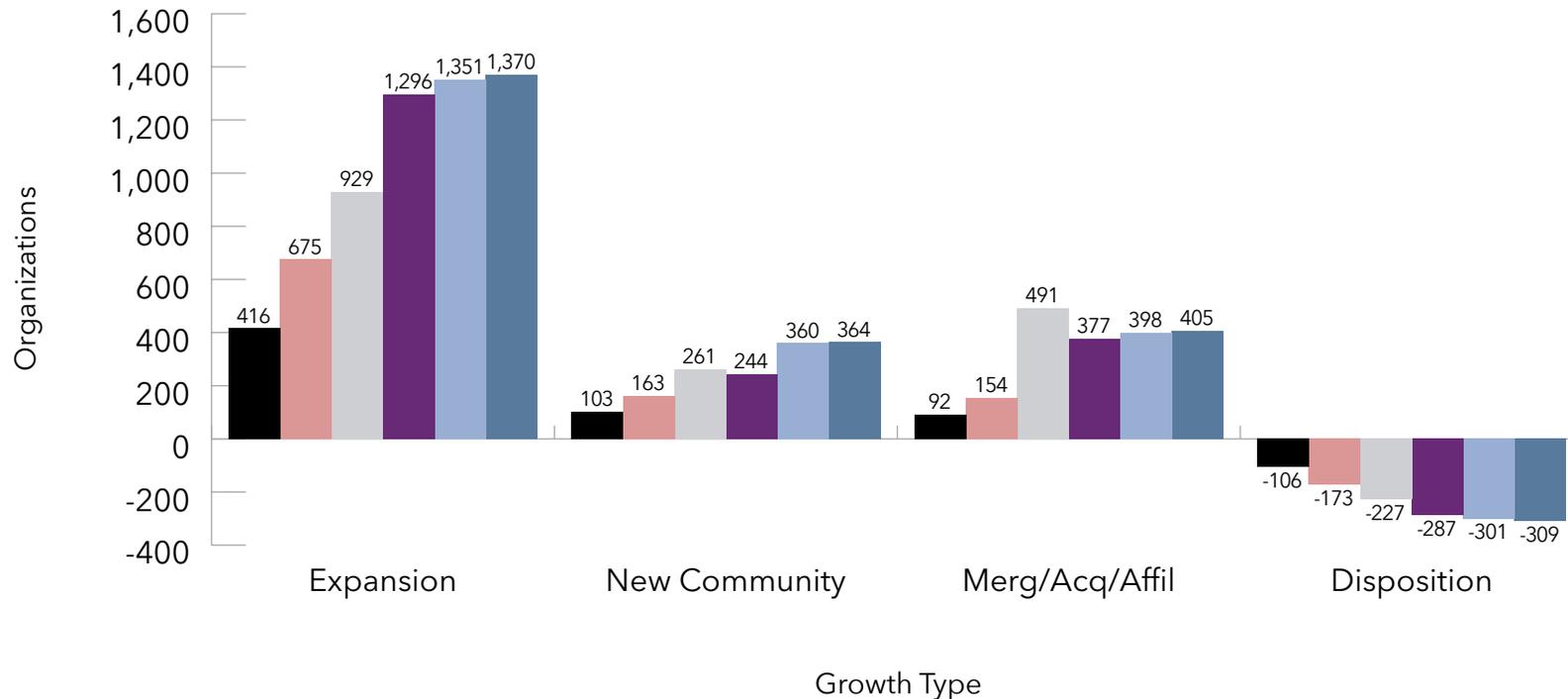
**New Community:** Growth by the addition of units through construction of a new location.

**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 2022



**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 2022



**KEY:**

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

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

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

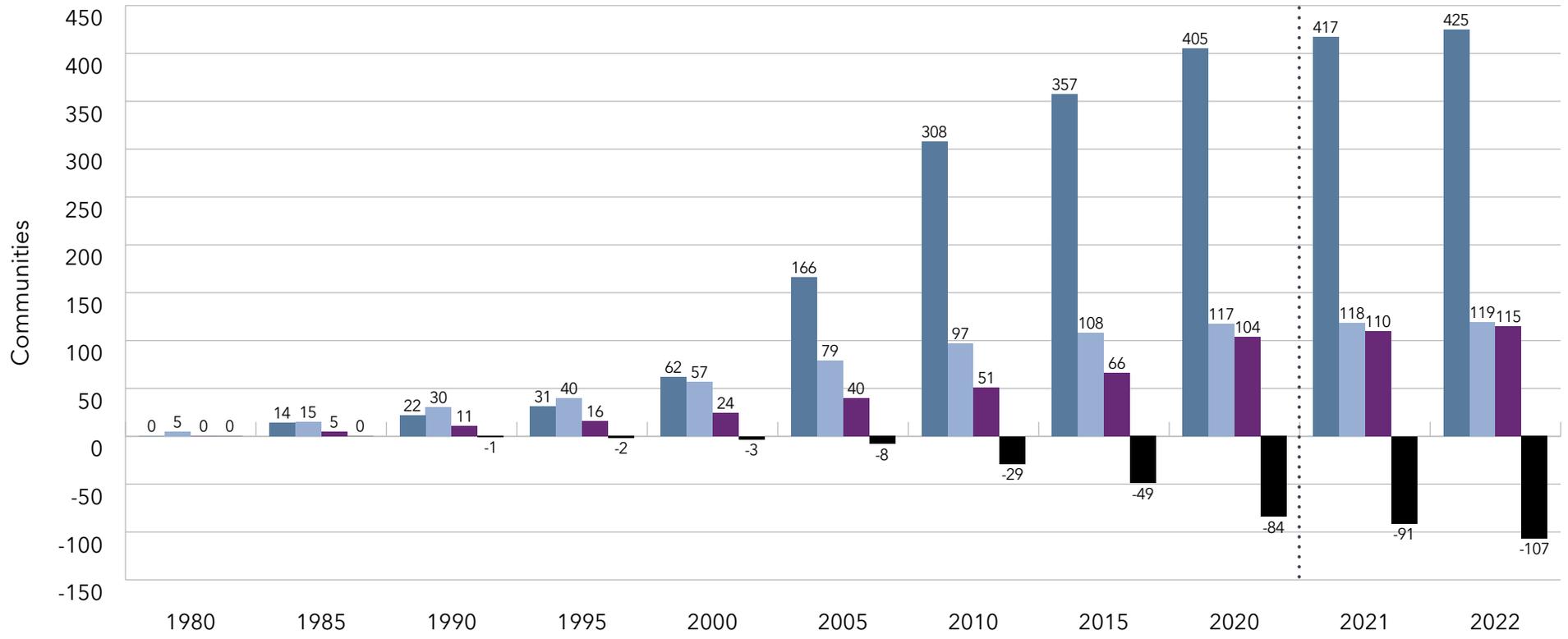
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Cumulative Growth of Largest 10 Systems



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

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

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

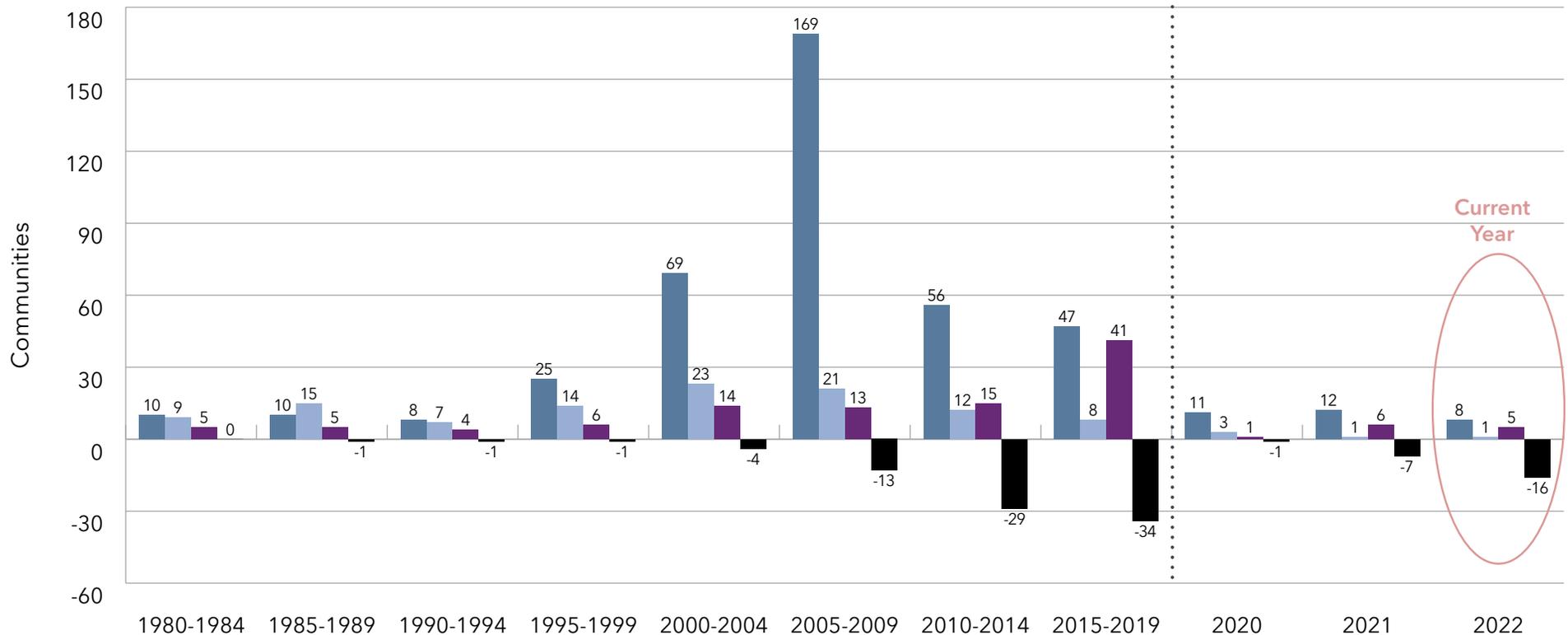
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Incremental Growth of Largest 10 Systems



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

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

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

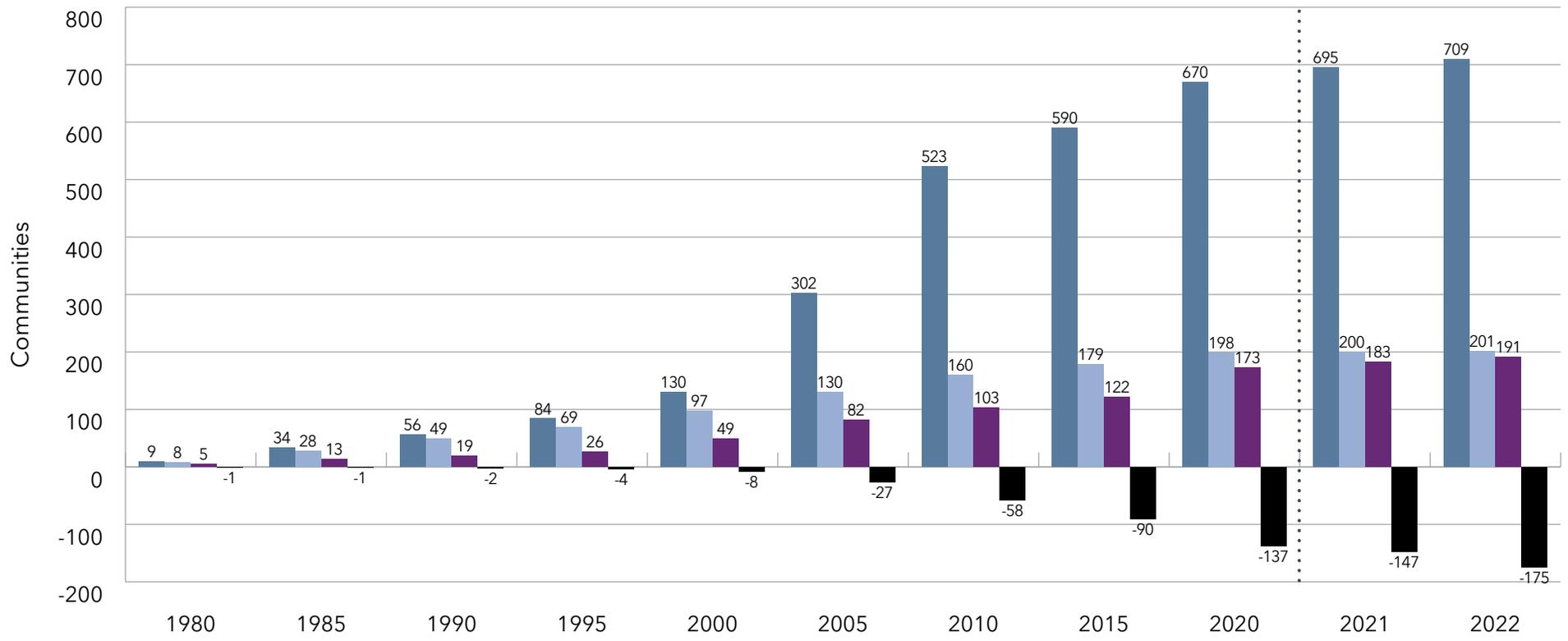
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Cumulative Growth of Largest 25 Systems



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

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

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

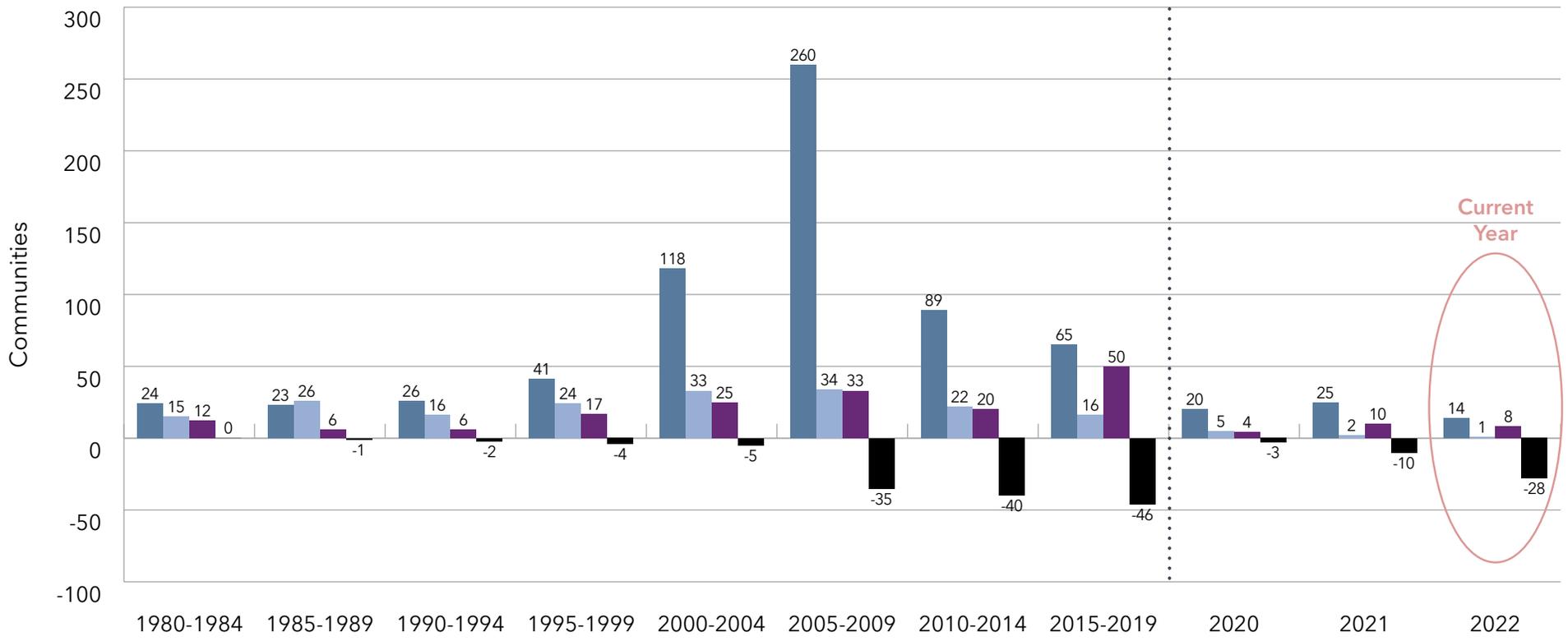
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Incremental Growth of Largest 25 Systems



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

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

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

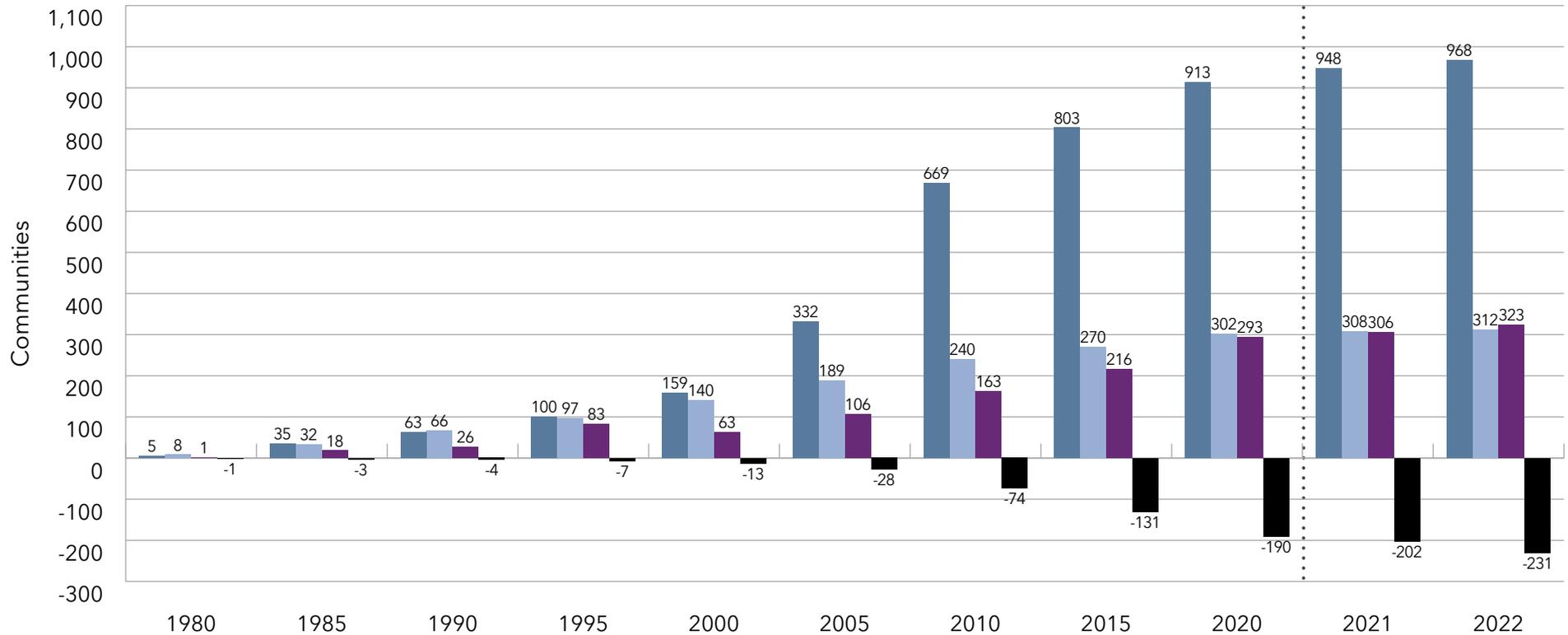
**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, 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 (dark blue), New Community (light blue), Merger/Aquisition/Affiliation (purple), Disposition (black)

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

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

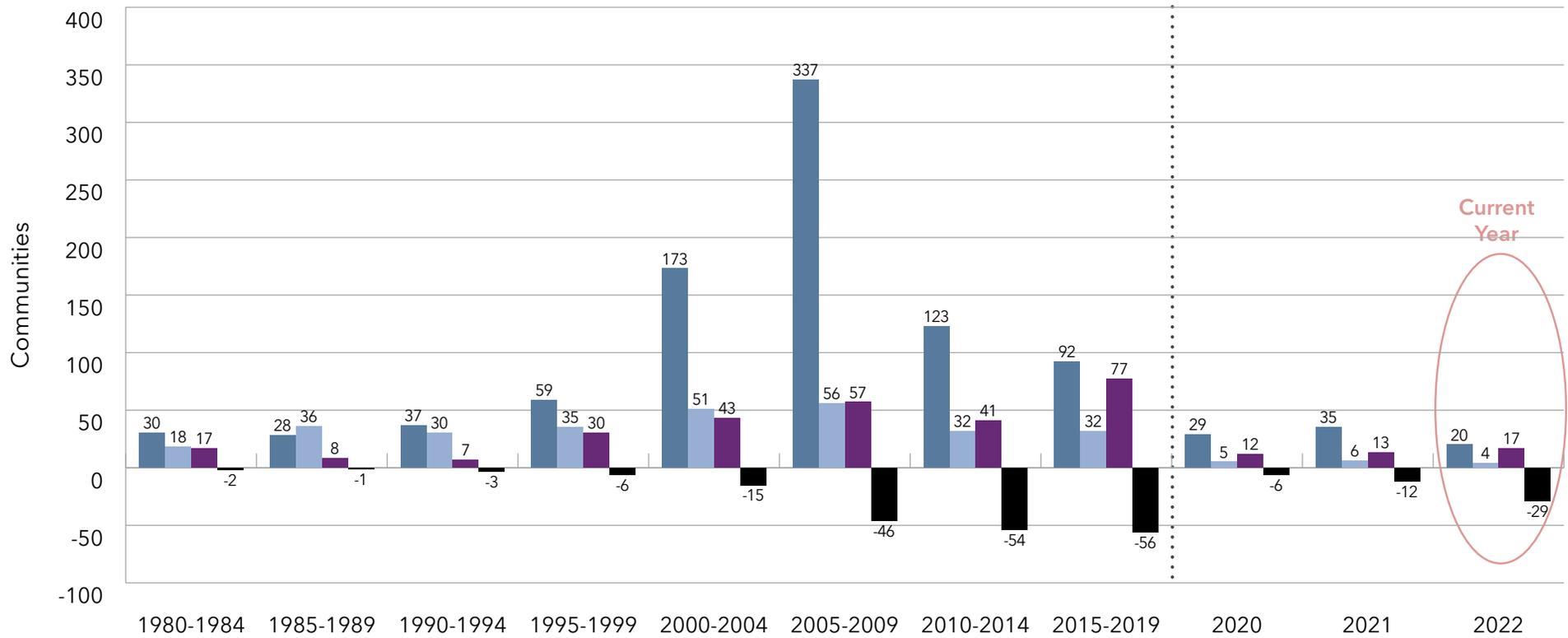
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Incremental Growth of Largest 50 Systems



**KEY:**

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

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

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

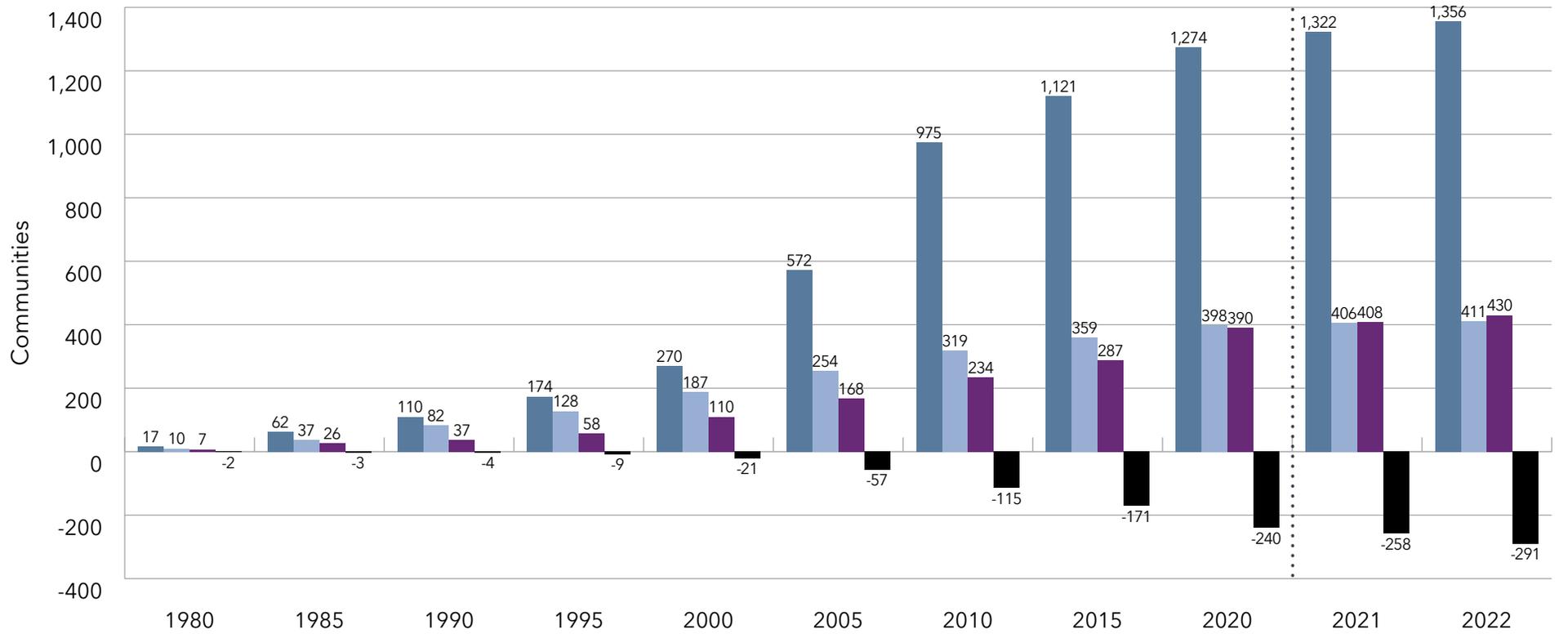
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Cumulative Growth of Largest 100 Systems



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

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

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

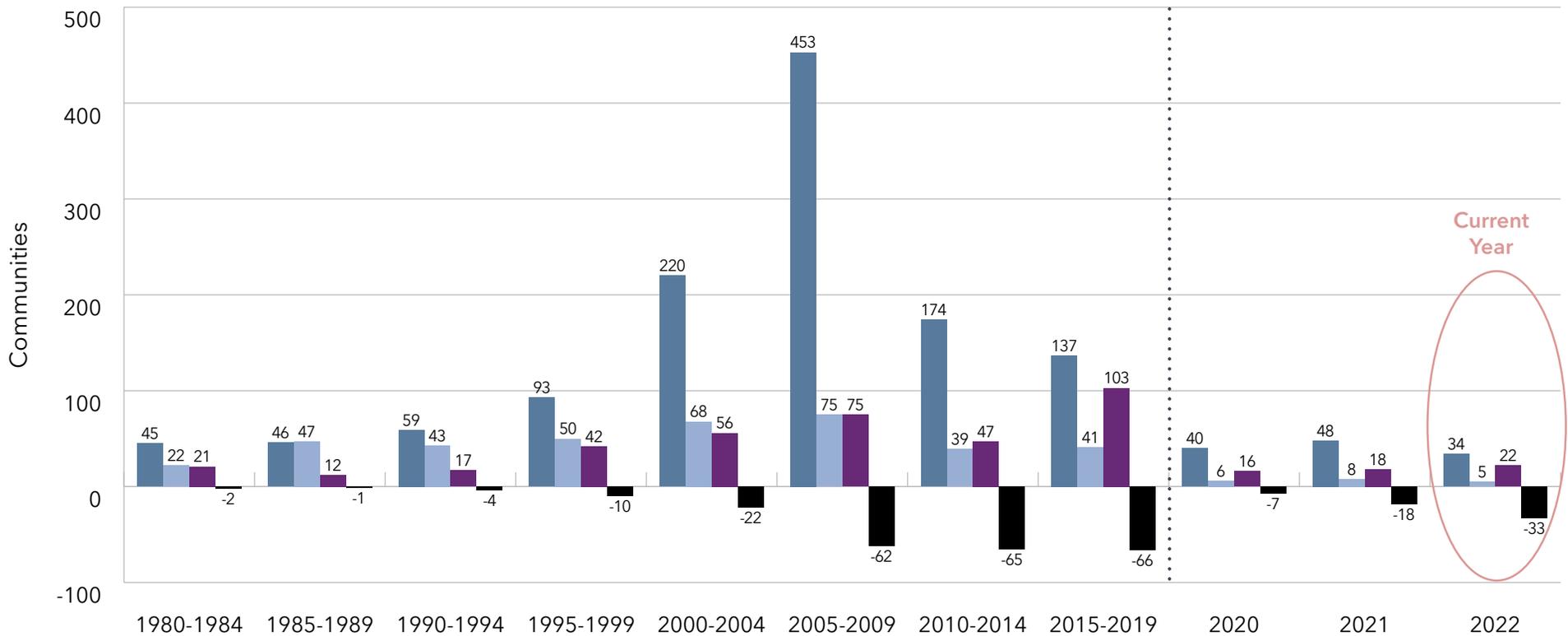
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Incremental Growth of Largest 100 Systems



**KEY:**

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

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

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

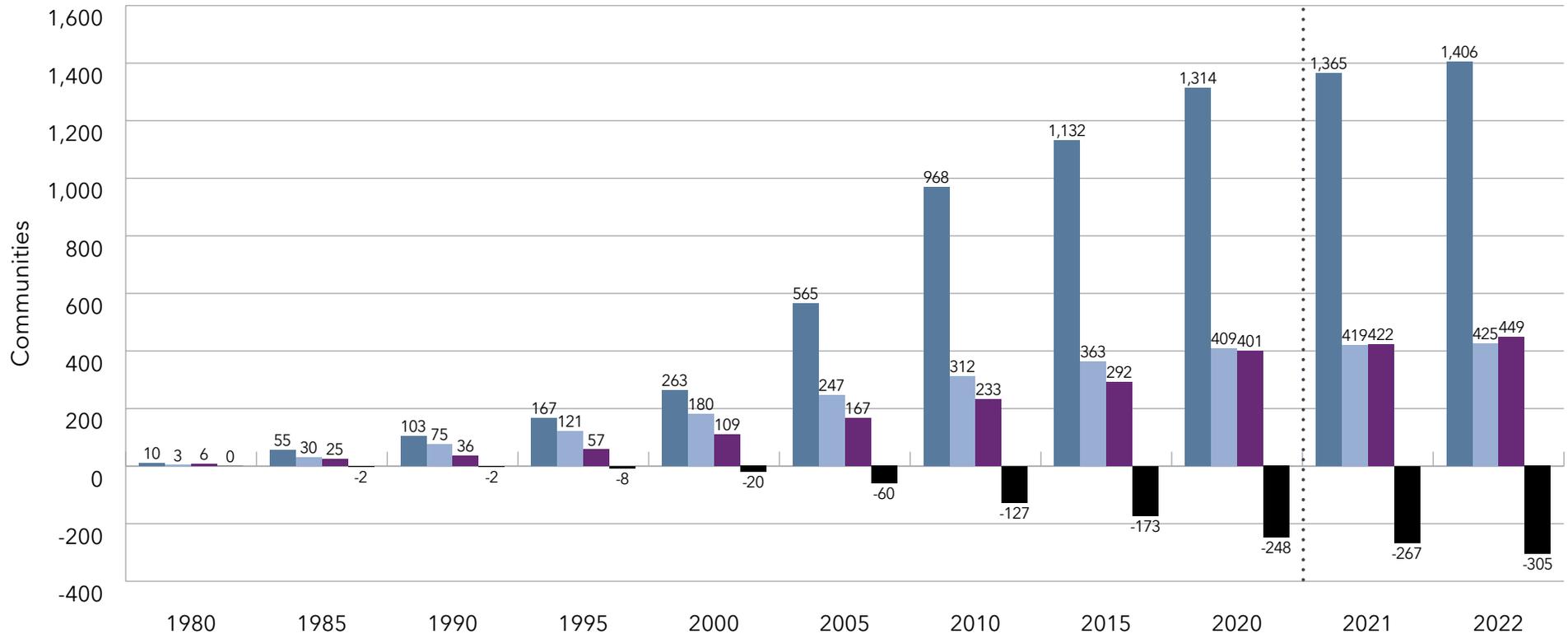
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

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

# Growth: Type of Growth of Communities

## Cumulative Growth of Largest 150 Systems



**KEY:**

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

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

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

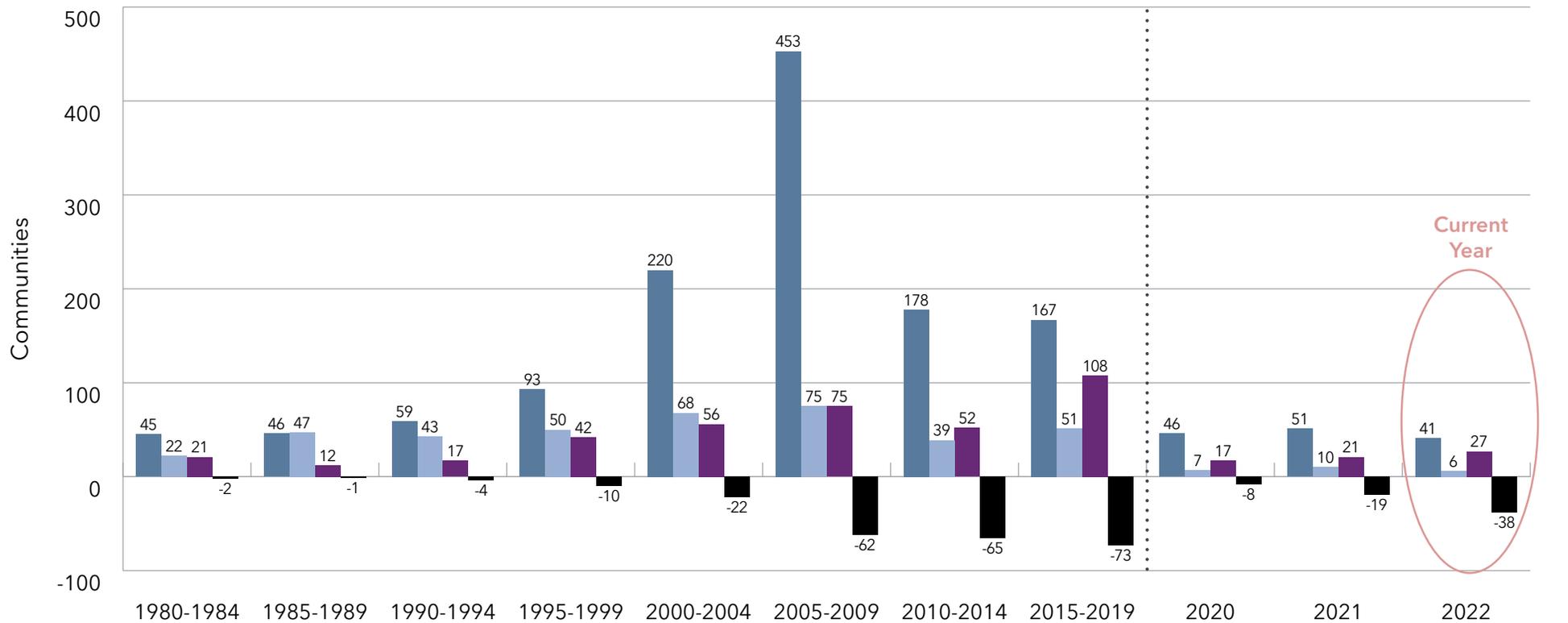
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

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

# Growth: Type of Growth by Communities

## Incremental Growth of Largest 150 Systems



**KEY:**

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

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

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

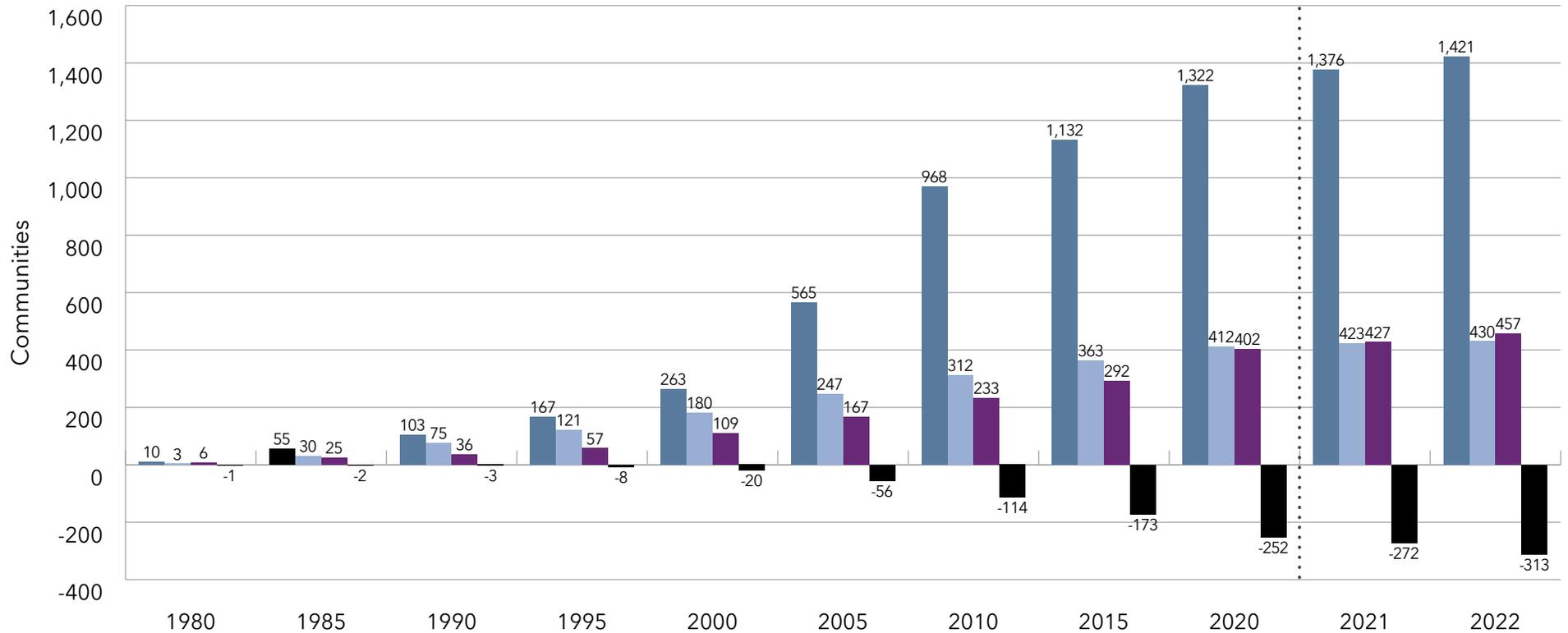
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

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

# Growth: Type of Growth by Communities

## Cumulative Growth Of Largest 200 Systems



KEY:

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

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

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

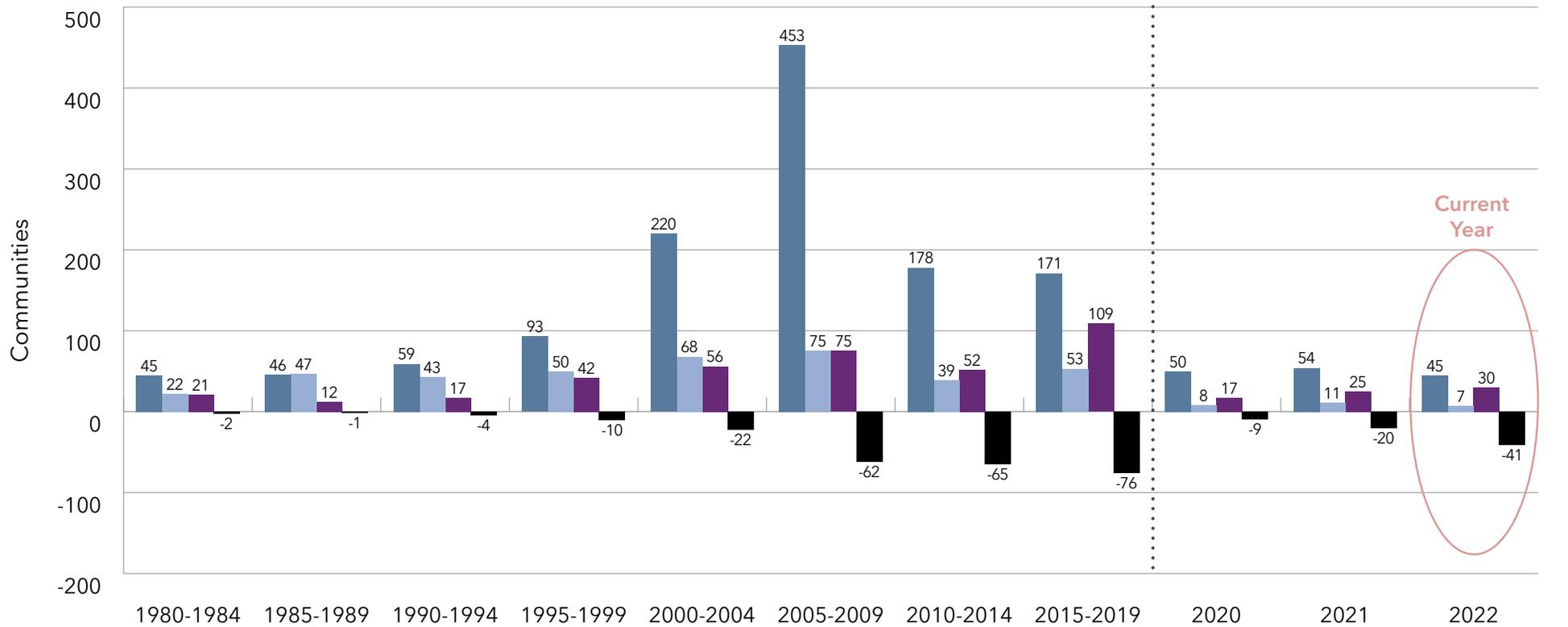
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

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

# Growth: Type of Growth by Communities

## Incremental Growth Of Largest 200 Systems



**KEY:**

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

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

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

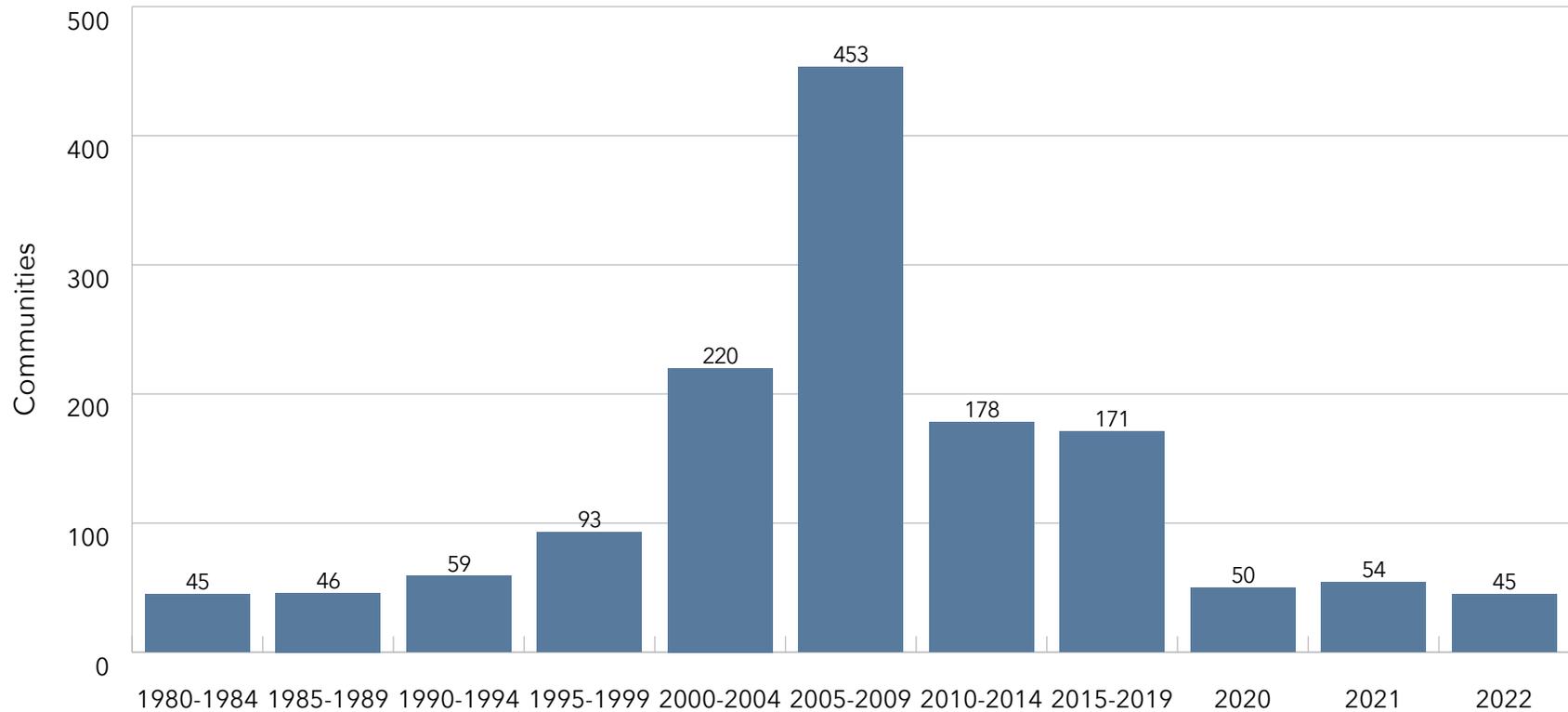
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

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

## Growth: Expansions

### Historical Growth Of Largest 200 Systems



KEY: ■ Expansion

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

## Growth: Expansions

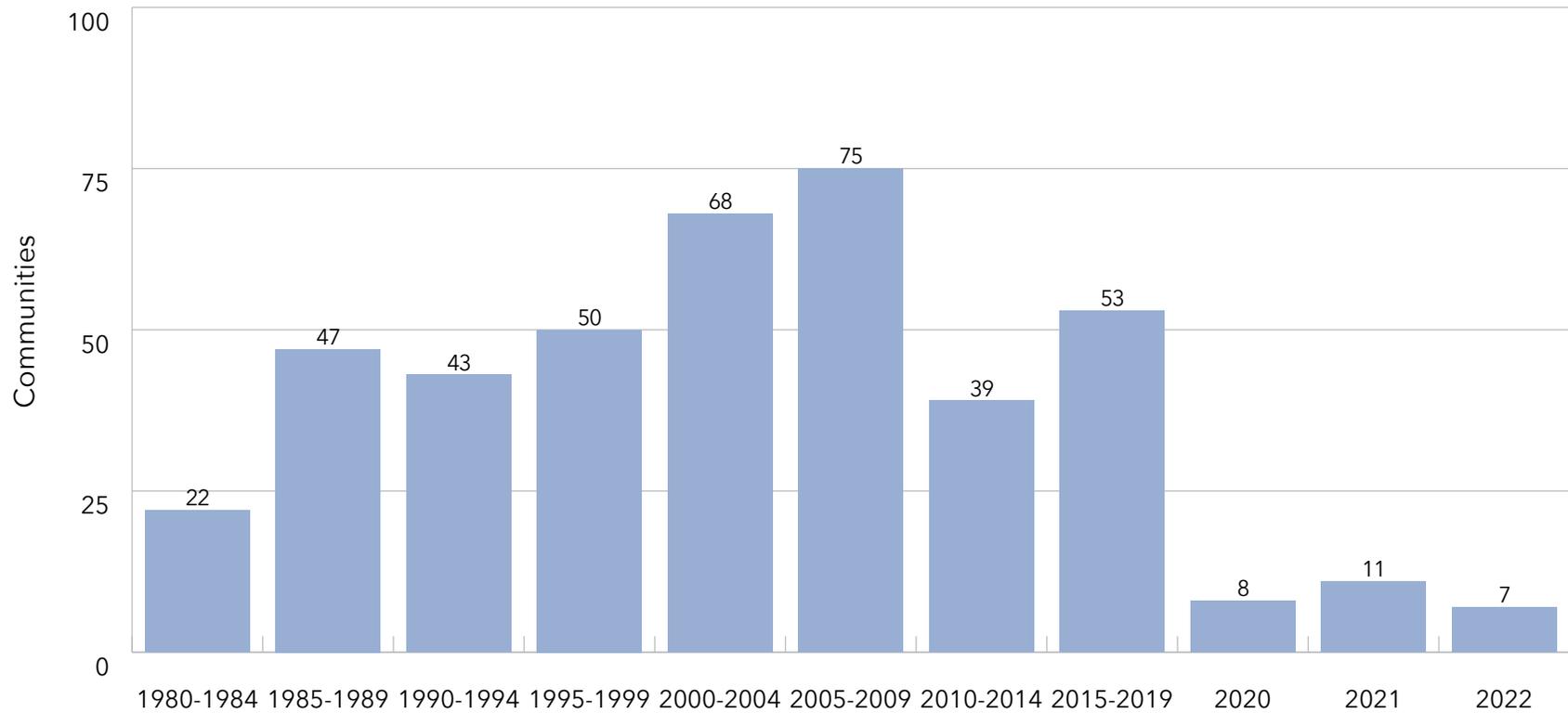
### 2022 Community Expansions

2023 Rank	System Name	Community	City	State	Community Type
1	National Senior Communities	Tallgrass Creek	Overland Park	KS	LPC
1	National Senior Communities	Ashby Ponds	Loudoun	VA	LPC
3	Presbyterian Homes & Services	Orchard Path	Apple Valley	MN	IL
4	Acts Retirement-Life Communities	Lanier Village Estates	Gainesville	GA	LPC
4	Acts Retirement-Life Communities	Country House	Wilmington	DE	LPC
8	Covenant Living Communities & Services	Covenant Living at Windsor Park	Carol Stream	IL	LPC
18	Otterbein SeniorLife	Otterbein Franklin	Franklin, IN	IN	LPC
22	BHI Senior Living, Inc.	Four Seasons	Columbus	IN	LPC
29	Willow Valley Communities	Willow Valley Communities	Lancaster	PA	LPC
35	WesleyLife	Fiedstone of Dewitt	Dewitt	IA	AL
82	Lutheran SeniorLife	St. John Community - Edgewood Grove	Mars	PA	AL
82	Lutheran SeniorLife	The Residence at St. John	Mars	PA	IL
86	Presbyterian Communities of South Carolina	The Village at Summerville	Summerville	SC	LPC
91	Haverland Carter Lifestyle Group	La Vida Llena	Albuquerque	NM	LPC
94	St. Andrew's Resources for Seniors System	Summerville on Francis Place Campus	St. Louis	MO	IL
100	Givens Communities	Givens Estates	Asheville	NC	LPC
102	Menno Haven, Inc.	Brookview	Chambersburg	PA	IL
111	The Moorings, Incorporated	Moorings Park Grande Lake	Naples	FL	IL
129	Futura Age fka eliseo and Foss Home	eliseo	Tacoma	WA	LPC
138	Sunset Senior Communities	Waterford Place	Jenison	MI	IL
160	FellowshipLIFE fka Fellowship Senior Living	Fellowship Village	Basking Ridge	NJ	LPC

Note: Due to the high volume of expansions in 2022, the cut off was less than 20 total units. There were an additional 24 expansions in 2022.

## Growth: New Communities

### Historical Growth Of Largest 200 Systems



KEY: ■ New Community

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

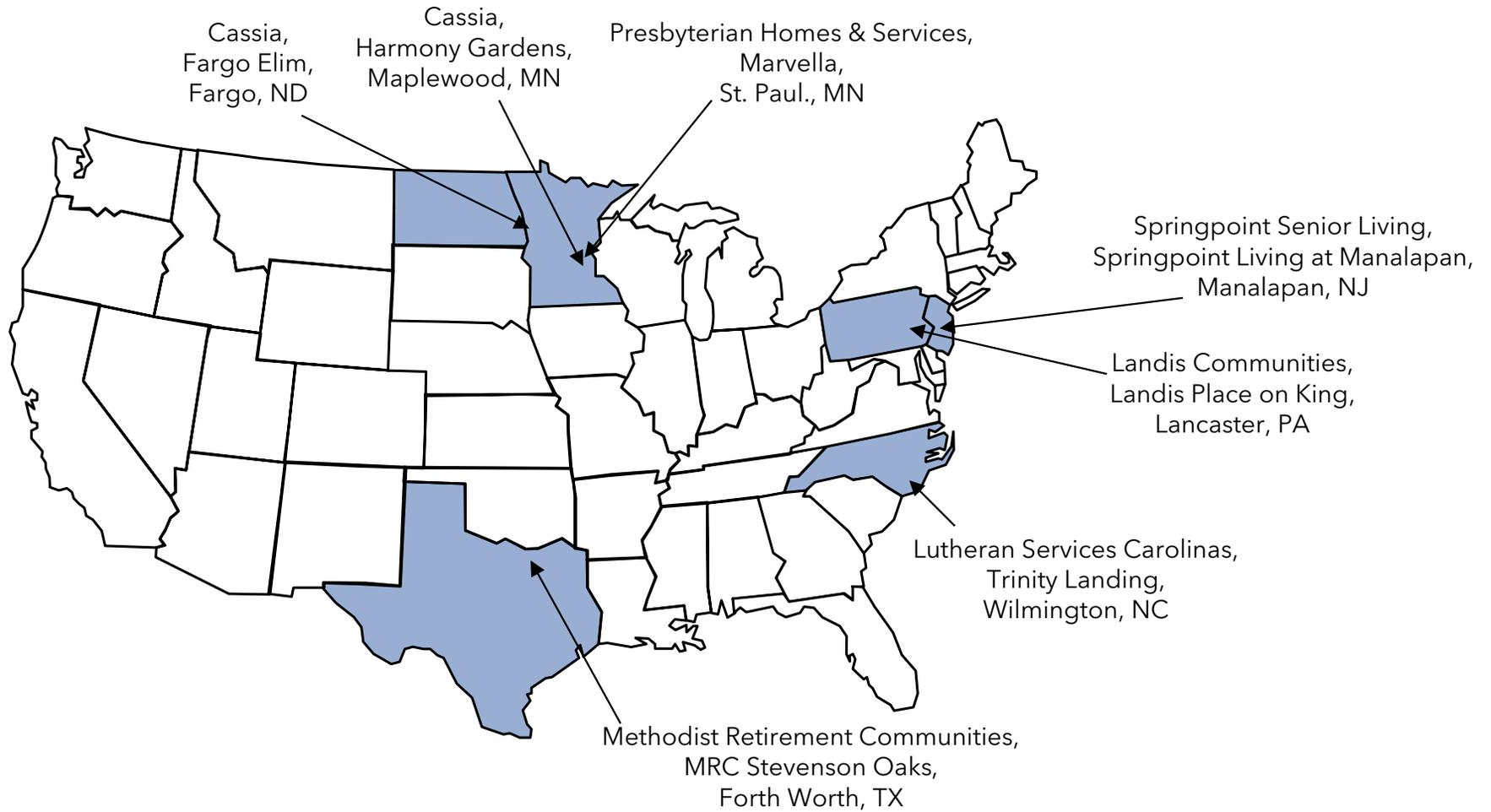
## Growth: New Communities

### 2022 Community Openings

2023 Rank	System Name	Community	City	State	Community Type
3	Presbyterian Homes & Services	Marvella	St. Paul	MN	IL
13	Cassia	Harmony Gardens	Maplewood	MN	AL
13	Cassia	Fargo Elim	Fargo	ND	NH
24	Springpoint Senior Living	Springpoint Living at Manalapan	Manalapan	NJ	AL
40	Lutheran Services Carolinas	Trinity Landing	Wilmington	NC	IL
51	Methodist Retirement Communities	MRC Stevenson Oaks	Fort Worth	TX	IL
106	Landis Communities	Landis Place on King	Lancaster	PA	IL

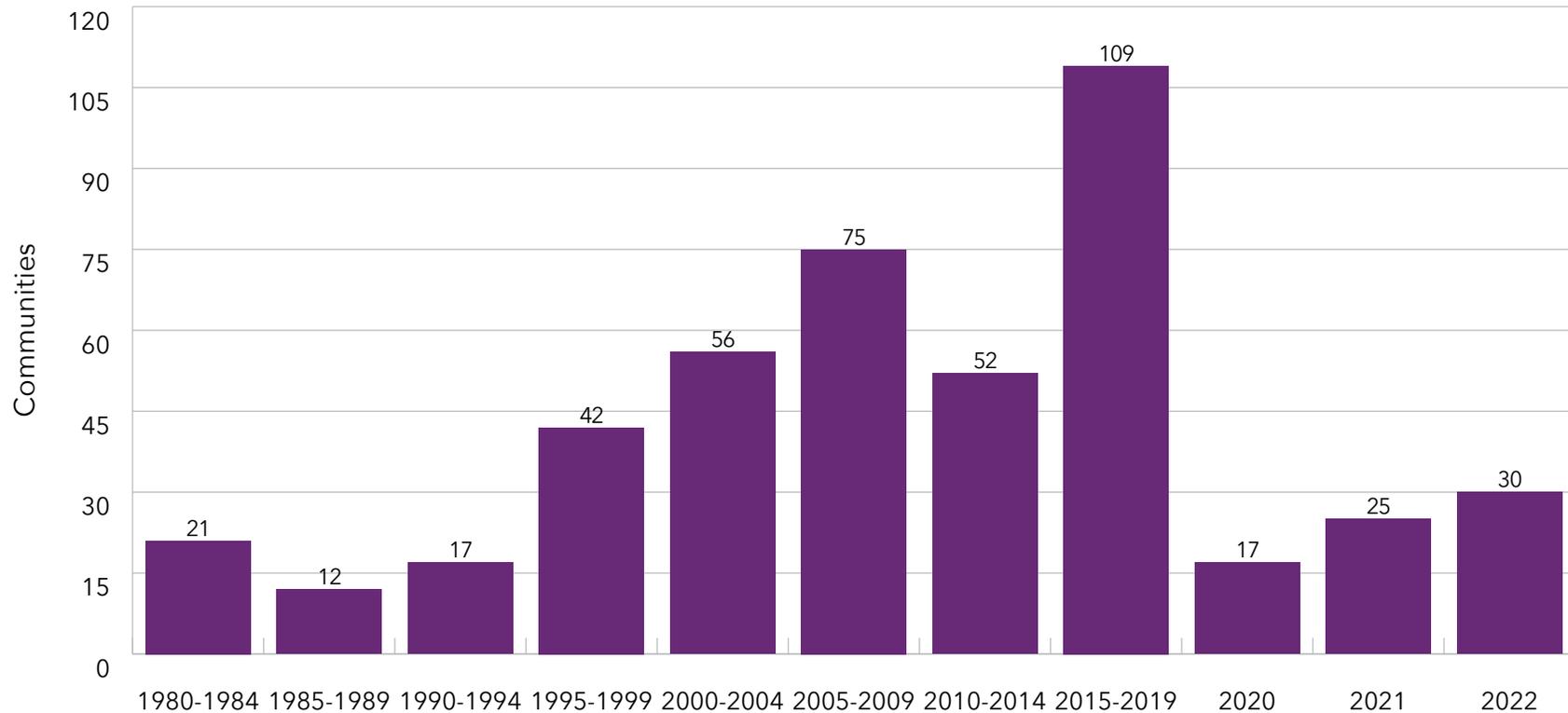
## Growth: New Communities

### 2022 Locations



## Growth: Mergers/Acquisitions/Affiliations

### Historical Growth Of Largest 200 Systems

**KEY:**

 Merger/Aquisition/Affiliation

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

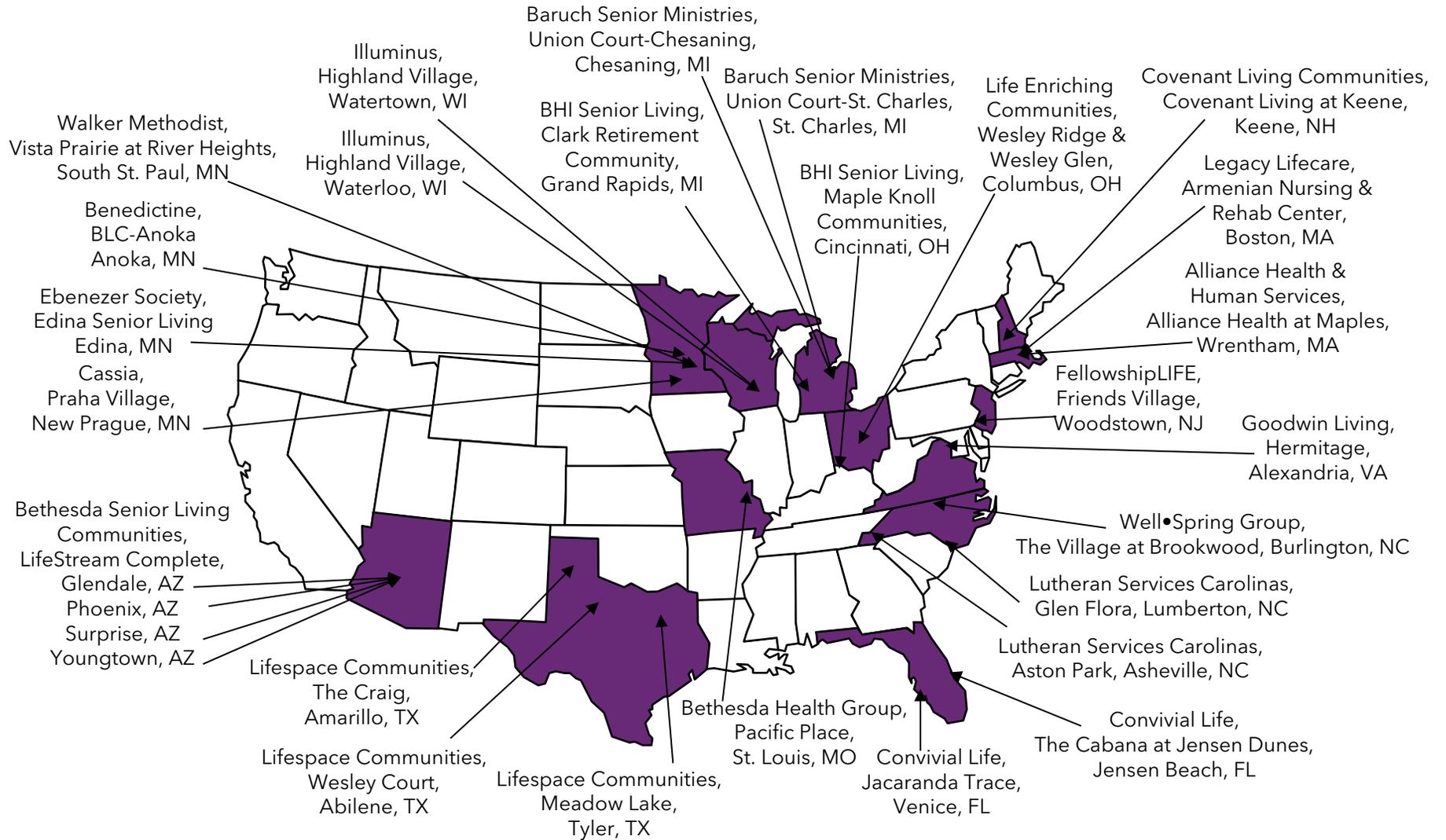
# Growth: Mergers/Acquisitions/Affiliations

## 2022 Mergers/Acquisitions/Affiliations

2023 Rank	System Name	Community	City	State	Community Type
6	Lifespace Communities, Inc.	The Craig	Amarillo	TX	LPC
6	Lifespace Communities, Inc.	Meadow Lake	Tyler	TX	LPC
6	Lifespace Communities, Inc.	Wesley Court	Abilene	TX	LPC
8	Covenant Living Communities & Services	Covenant Living of Keene	Keene	NH	LPC
10	Benedictine	BLC-Anoka	Anoka	MN	AL
13	Cassia	Praha Village, LLC	New Prague	MN	AL
22	BHI Senior Living, Inc.	Clark Retirement Community	Grand Rapids	MI	LPC
22	BHI Senior Living, Inc.	Maple Knoll Communities	Springdale/Oxford	OH	LPC
30	Bethesda Senior Living Communities	LifeStream Complete	Glendale	AZ	IL
30	Bethesda Senior Living Communities	LifeStream Complete	Phoenix	AZ	IL
30	Bethesda Senior Living Communities	LifeStream Complete	Surprise	AZ	IL
30	Bethesda Senior Living Communities	LifeStream Complete	Youngtown	AZ	LPC
40	Lutheran Services Carolinas	Glen Flora	Lumberton	NC	NH
40	Lutheran Services Carolinas	Aston Park	Asheville	NC	NH
41	Bethesda Health Group, Inc.	Pacific Place	St. Louis	MO	IL
44	Life Enriching Communities	Wesley Ridge	Columbus	OH	LPC
44	Life Enriching Communities	Wesley Glen	Columbus	OH	LPC
73	Baruch Senior Ministries	Union Court - Chesaning	Chesaning	MI	AL
73	Baruch Senior Ministries	Union Court - St. Charles	St. Charles	MI	AL
74	Legacy Lifecare	Armenian Nursing and Rehabilitation Center	Boston	MA	NH
81	Walker Methodist	Vista Prairie at River Heights	South St. Paul	MN	AL
85	Goodwin Living fka Goodwin House Incorpo-	Hermitage Northern Virginia	Alexandria	VA	LPC
108	Alliance Health & Human Services	Alliance Health at Maples	Wrentham	MA	NH
117	Illuminus fka Marquardt Village, Inc.	Highland Village	Watertown	WI	IL
117	Illuminus fka Marquardt Village, Inc.	Highland Village	Waterloo	WI	AL
126	Ebenezer Society	Edina Senior Living	Edina	MN	AL
144	Well•Spring Group	The Village at Brookwood	Burlington	NC	LPC
160	FellowshipLIFE fka Fellowship Senior Living	Friends Village	Woodstown	NJ	LPC
194	Convivial Life Inc.	Convivial Jacaranda Trace	Venice	FL	IL
194	Convivial Life Inc.	The Cabana at Jensen Dunes	Jensen Beach	FL	AL

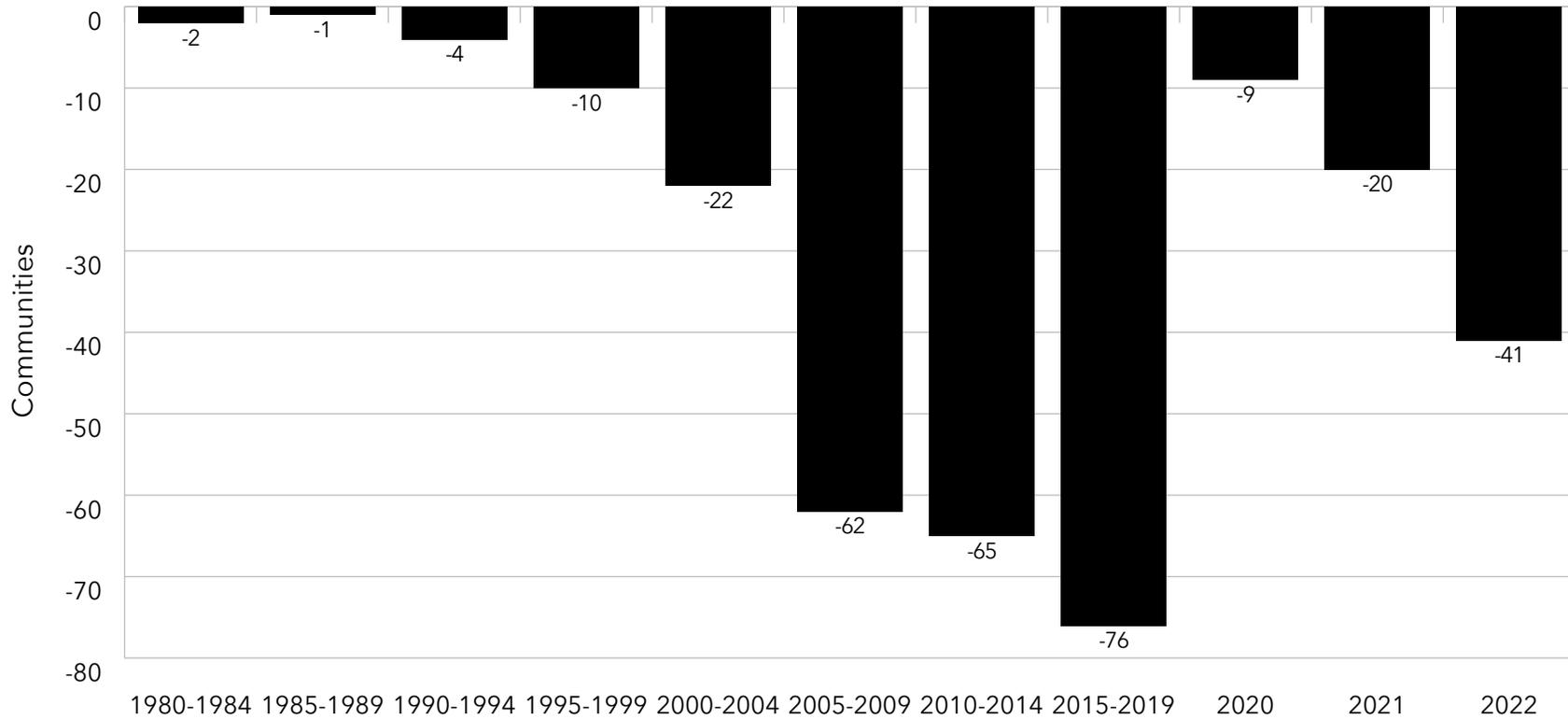
# Growth: Affiliations/Mergers/Acquisitions

## 2022 Locations



# Growth: Dispositions

## Historical Growth Of Largest 200 Systems



KEY:  Disposition

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

## Growth: Dispositions

### 2022 Community Closures or Dispositions

2022 Rank	System Name	Community	City	State	Community Type
2	The Evangelical Lutheran Good Samaritan Society	Arapahoe (CA Mues)	Arapahoe	NE	NH
2	The Evangelical Lutheran Good Samaritan Society	Ravenna GSC	Ravenna	NE	NH
2	The Evangelical Lutheran Good Samaritan Society	Lennox GSC	Lennox	SD	NH
2	The Evangelical Lutheran Good Samaritan Society	Mott GS Nursing Center	Mott	ND	NH
2	The Evangelical Lutheran Good Samaritan Society	Valentine (Pine View)	Valentine	NE	NH
2	The Evangelical Lutheran Good Samaritan Society	Newell GS Center	Newell	IA	NH
2	The Evangelical Lutheran Good Samaritan Society	Fontanelle Good Sam. Center	Fontanelle	IA	LPC
2	The Evangelical Lutheran Good Samaritan Society	Silverton (Silver Wood GS Center)	Silverton	ID	LPC
2	The Evangelical Lutheran Good Samaritan Society	Eureka (Mt View Manor GSS)	Eureka	MT	NH
2	The Evangelical Lutheran Good Samaritan Society	Clear Lake (Deuel County GSC)	Clear Lake	SD	LPC
2	The Evangelical Lutheran Good Samaritan Society	Idaho Falls GS Center	Idaho Falls	ID	NH
2	The Evangelical Lutheran Good Samaritan Society	Lyons GS Center	Lyons	KS	NH
2	The Evangelical Lutheran Good Samaritan Society	Brookings (Curry GSS)	Brookings	OR	LPC
2	The Evangelical Lutheran Good Samaritan Society	Goodland (Sherman County)	Goodland	KS	NH
3	Presbyterian Homes & Services	Interlude Fridley	Fridley	MN	NH
3	Presbyterian Homes & Services	Interludes Plymouth	Plymouth	MN	NH
15	Lutheran Senior Services	Heisinger Bluffs	Jefferson City	MO	LPC
15	Lutheran Senior Services	St. Joseph's Bluffs	Jefferson City	MO	NH
16	The Kendal Corporation	Chandler Hall	Newtown	PA	LPC
19	Presbyterian Senior Living	The Easton Home	Easton	PA	AL
25	Retirement Housing Foundation	Mayflower Gardens Convalescent Hospital	Lancaster	CA	NH
25	Retirement Housing Foundation	Bishop's Glen	Holly Hill	FL	LPC
25	Retirement Housing Foundation	The Cloisters	DeLand	FL	IL
25	Retirement Housing Foundation	Courtenay Springs Village	Merritt Island	FL	LPC
25	Retirement Housing Foundation	DeSmet Retirement Community	Florissant	MO	IL

## Growth: Dispositions (Continued)

### 2022 Community Closures or Dispositions

2022 Rank	System Name	Community	City	State	Community Type
25	Retirement Housing Foundation	St. Catherine Retirement Community	Florissant	MO	IL
25	Retirement Housing Foundation	Westminster Village / Health Care Center	Clarksville	IN	LPC
25	Retirement Housing Foundation	Plymouth Square	Stockton	CA	LPC
47	United Church Homes, Inc.	Pilgrim Manor	Grand Rapids	MI	AL
55	Baptist Village Communities	Baptist Village	Hugo	OK	LPC
76	Providence Life Services	Providence Downers Grove	Downers Grove	IL	NH
76	Providence Life Services	Saratoga Grove	Downers Grove	IL	AL
90	Pinnacle Living	Hermitage Northern Virginia	Alexandria	VA	AL
104	Saint Therese	Transitional Care by Saint Therese	Robbinsdale	MN	NH
108	Alliance Health & Human Services	Alliance Health at Abbott	Lynn	MA	NH
108	Alliance Health & Human Services	Alliance Health at Devereux	Marblehead	MA	NH
117	Illuminus fka Marquardt Village, Inc.	Epione Pavillion	Cuba City	WI	NH
130	Vista Prairie Communities	Vista Prairie at River Heights	South St. Paul	MN	AL
154	Baptist Senior Services	Baptist Homes	Pittsburgh	PA	NH
185	Beechwood Continuing Care, Inc.	Lockport Presbyterian Home	Lockport	NY	AL
193	Genacross Lutheran Services	Bethany Place	Fremont	OH	IL

# Growth: Dispositions

## 2022 Locations

\*\*ELGSS:

\*Silver Wood GS Center, Silverton, ID  
 Idaho Falls GS Center, Idaho Falls, ID

\*\*ELGSS:

\*Mt. View Manor GSS, Eureka, MT

\*\*ELGSS:

\*Mott GS Nursing Home, Mott, ND

\*\*ELGSS:

\*Lennox GSC, Lennox, SD  
 \*Deuel County GSC, Clear Lake, SD

\*\*ELGSS:

Curry GSS, Brookings, OR

Retirement Housing Foundation:  
 Plymouth Square, Stockton, CA

\*Mayflower Gardens, Lancaster, CA

\*\*ELGSS:

\*Pine View, Valentine, NE  
 \*CA Mues, Arapahoe, NE  
 \*Ravenna GAS, Ravenna, NE

\*\*ELGSS:

Lyons GS Center, Lyons, KS  
 Sherman County, Goodland, KS

Baptist Village Communities,  
 Baptist Village, Hugo, OK

Saint Therese,  
 Transitional Care,  
 Robbinsdale, MN

Vista Prairie Communities,  
 Vista Prairie at River Heights,  
 South St. Paul, MN

Presbyterian Homes & Services:

\*Interlude, Fridley, MN  
 \*Interludes, Plymouth, MN

Illuminus,  
 Epione Pavillion,  
 Cuba City, WI

United Church Homes,  
 Pilgrim Manor,  
 Grand Rapids, MI

Genacross Lutheran Services,  
 Bethany Place, Fremont, OH

Alliance Health & Human Services:  
 Alliance Health at Abbott, Lynn, MA  
 Alliance Health at Devereux, Marblehead, MA

Beechwood Continuing Care,  
 Lockport Presbyterian Home,  
 Lockport, NY

The Kendal Corporation,  
 Chandler Hall, Newtown, PA

Presbyterian Senior Living,  
 \*The Easton Home, Easton, PA

Baptist Senior Services,  
 Baptist Homes, Pittsburgh, PA

Pinnacle Living,  
 Hermitage Northern Virginia,  
 Alexandria, VA

Retirement Housing Foundation:  
 Bishop's Glen, Holly Hill, FL  
 The Cloisters, DeLand, FL  
 Courtenay Springs, Merritt Island, FL

\*\*ELGSS:

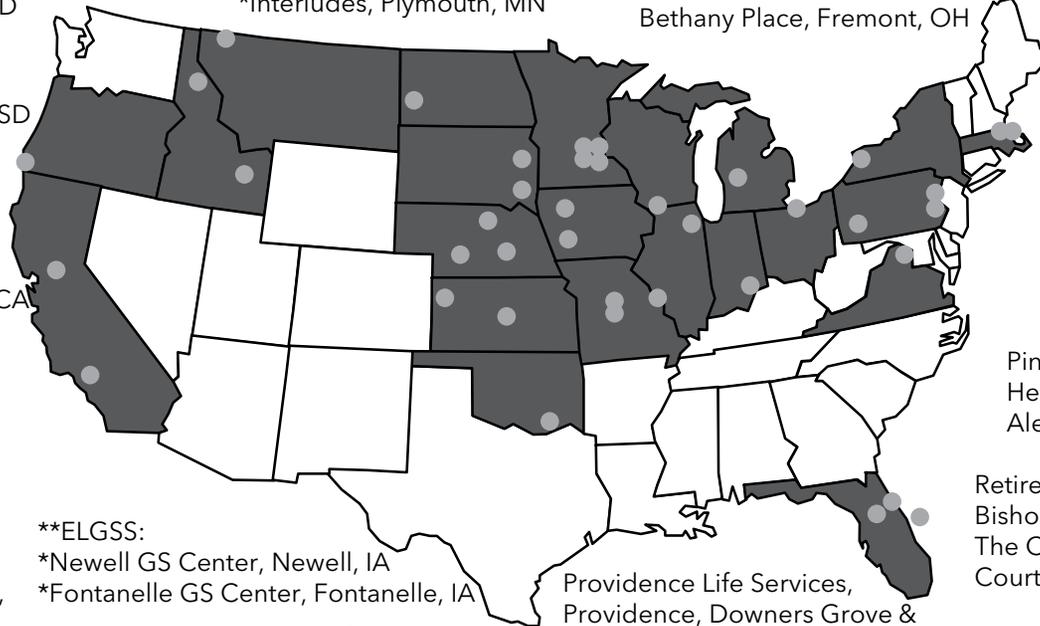
\*Newell GS Center, Newell, IA  
 \*Fontanelle GS Center, Fontanelle, IA

Retirement Housing Foundation:  
 DeSmet Retirement Community &  
 St. Catherine Retirement Community,  
 Florissant, MO

Lutheran Senior Services,  
 Heisinger Bluffs & St. Joseph's Bluffs,

Providence Life Services,  
 Providence, Downers Grove &  
 Saratoga Grove,  
 Downers Grove, IL

Retirement Housing Foundation:  
 Westminster Village, Clarksville, IN



**Of the 41 Dispositions:**  
 19 Closures\*  
 21 Sold  
 1 Disaffiliated  
 \*\* ELGSS - Evangelical Lutheran Good Samaritan Society

# Chapter 6

## *Additional Listings*

Additional listings were added to LZ 200 with its inaugural publication: single-campus senior living and largest individual campuses. These lists are composed of LeadingAge members that fit within these specific categories. Like the rest of the LZ 200, these are quantitative, not qualitative, listings. It should be noted that with the 2023 LZ 200, the single-campus senior living listings are increasing from the largest 150 to the largest 200.

## *Single-Campus Senior Living Communities*

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

Chart 6-1b shows a small percentage (6%) of single-site campuses offer affordable housing. Chart 6-1c-d shows that 44% of these organizations

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

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

Two new charts added in the 2023 LZ 200 are 6-1g-h, which show future growth of single-site communities wherein 64% plan to expand or reposition in 2023 or 2024, while 11% plan to grow their community either through affiliation or new development (a 2nd campus or satellite campus).

## *Largest Individual Campuses*

Added back into the publication in 2019 is a listing of the largest 200 not-for-profit campuses in the country, regardless of whether they are a single-campus community or part of a multi-site organization within the LZ 200 (Chart 6-1i). The largest campus, Riderwood Village (MD), has a total of 2,153 market-rate units.

## Additional Listings: Single-Campus Senior Living Communities

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

2023 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
1	Shell Point Retirement Community	Fort Myers	FL	1,869	1,334	355	180	71.4%	19.0%	9.6%
2	Charlestown Community	Catonsville	MD	1,713	1,402	208	103	81.8%	12.1%	6.0%
3	John Knox Village	Lee's Summit	MO	1,397	1,022	182	193	73.2%	13.0%	13.8%
4	The Hebrew Home at Riverdale	Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
5	Cross Keys Village – The Brethren Home Community	New Oxford	PA	983	590	123	270	60.0%	12.5%	27.5%
6	Panorama	Lacey	WA	971	787	44	140	81.1%	4.5%	14.4%
7	John Knox Village of FL	Pompano Beach	FL	899	653	62	184	72.6%	6.9%	20.5%
8	Brethren Village	Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%
9	Westminster Canterbury Richmond	Richmond	VA	807	486	163	158	60.2%	20.2%	19.6%
10	Charles E. Smith Life Communities	Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
11	Mennonite Home Communities	Lancaster	PA	770	525	85	160	68.2%	11.0%	20.8%
12	Friendship Village of Tempe	Tempe	AZ	768	549	91	128	71.5%	11.8%	16.7%
13	Glencroft Center for Modern Aging	Glendale	AZ	729	391	178	160	53.6%	24.4%	21.9%
14	Lakeview Village	Lenexa	KS	713	529	26	158	74.2%	3.6%	22.2%
15	Beatitudes Campus	Phoenix	AZ	688	495	121	72	71.9%	17.6%	10.5%
16	St Camillus	Wauwatosa	WI	686	440	196	50	64.1%	28.6%	7.3%
17	Atlantic Shores Cooperative Association	Virginia Beach	VA	671	555	66	50	82.7%	9.8%	7.5%
18	Fleet Landing	Atlantic Beach	FL	665	482	118	65	72.5%	17.7%	9.8%
19	John Knox Village of Central Florida	Orange City	FL	654	455	49	150	69.6%	7.5%	22.9%
20	Carolina Meadows, Inc.	Chapel Hill	NC	640	476	78	86	74.4%	12.2%	13.4%
21	Waterman Communities	Mount Dora	FL	639	418	101	120	65.4%	15.8%	18.8%
22	Tel Hai Retirement Community	Honey Brook	PA	635	406	100	129	63.9%	15.7%	20.3%
23	Army Residence Community	San Antonio	TX	634	465	78	91	73.3%	12.3%	14.4%
24	Miami Jewish Health	Miami	FL	633	95	100	438	15.0%	15.8%	69.2%
25	Rolling Green Village	Greenville	SC	626	502	50	74	80.2%	8.0%	11.8%

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

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

2023 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	Mary's Woods at Marylhurst, Inc.	Lake Oswego	OR	626	478	148	0	76.4%	23.6%	0.0%
27	La Posada at Park Centre, Inc.	Green Valley	AZ	625	490	135	0	78.4%	21.6%	0.0%
28	VMP	West Allis	WI	624	294	180	150	47.1%	28.8%	24.0%
29	Copeland Oaks	Sebring	OH	621	320	125	176	51.5%	20.1%	28.3%
30	Forefront Living	Dallas	TX	616	365	145	106	59.3%	23.5%	17.2%
31	Manor Park Inc.	Midland	TX	607	318	114	175	52.4%	18.8%	28.8%
32	Twin Lakes Community	Burlington	NC	606	434	68	104	71.6%	11.2%	17.2%
33	Springmoor Life Care Retirement Community	Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
34	Jewish Senior Living Group	San Francisco	CA	580	0	202	378	0.0%	34.8%	65.2%
35	Richfield Living	Salem	VA	567	97	226	244	17.1%	39.9%	43.0%
36	St. Camillus	Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
37	Masonic Care Community of New York	Utica	NY	551	151	80	320	27.4%	14.5%	58.1%
38	Mennonite Home of Albany, Inc.	Albany	OR	543	322	126	95	59.3%	23.2%	17.5%
39	Casa de las Campanas	San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
40	The Philadelphia Protestant Home	Philadelphia	PA	539	248	175	116	46.0%	32.5%	21.5%
41	Westminster	Austin	TX	538	409	74	55	76.0%	13.8%	10.2%
42	Royal Oaks Lifeplan Community	Sun City	AZ	533	358	175	0	67.2%	32.8%	0.0%
43	Paradise Valley Estates	Fairfield	CA	529	391	78	60	73.9%	14.7%	11.3%
44	Cypress Cove at HealthPark Florida	Fort Myers	FL	529	381	88	60	72.0%	16.6%	11.3%
45	Pine Run Retirement Community	Doylestown	PA	527	291	146	90	55.2%	27.7%	17.1%
46	Aldersgate United Methodist Retirement Community, Inc.	Charlotte	NC	525	300	105	120	57.1%	20.0%	22.9%
47	The Lutheran Home	Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
48	The Advent Christian Village	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
49	CC Young	Dallas	TX	507	223	160	124	44.0%	31.6%	24.5%
50	Deerfield Episcopal Retirement Community, Inc.	Asheville	NC	503	379	62	62	75.3%	12.3%	12.3%

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

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

2023 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	Londonderry Village	Palmyra	PA	500	374	38	88	74.8%	7.6%	17.6%
52	Carolina Village, Inc.	Hendersonville	NC	497	379	60	58	76.3%	12.1%	11.7%
53	Bridgewater Retirement Community	Bridgewater	VA	494	269	98	127	54.5%	19.8%	25.7%
54	The Estates at Carpenters	Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%
55	Riddle Village	Media,	PA	493	358	49	86	72.6%	9.9%	17.4%
56	Moravian Manor Communities	Lititz	PA	489	315	55	119	64.4%	11.2%	24.3%
57	The Wesleyan	Georgetown	TX	488	262	84	142	53.7%	17.2%	29.1%
58	Lenbrook	Atlanta	GA	481	403	18	60	83.8%	3.7%	12.5%
59	Bishop Gadsden Episcopal Retirement Community	Charleston	SC	479	268	111	100	55.9%	23.2%	20.9%
60	Falcons Landing	Sterling	VA	477	328	89	60	68.8%	18.7%	12.6%
61	Cornwall Manor	Cornwall	PA	475	343	36	96	72.2%	7.6%	20.2%
62	The Forum at Rancho San Antonio	Cupertino	CA	474	342	84	48	72.2%	17.7%	10.1%
63	Montereau, Inc.	Tulsa	OK	474	327	73	74	69.0%	15.4%	15.6%
64	Williamsburg Landing, Inc.	Williamsburg	VA	474	318	98	58	67.1%	20.7%	12.2%
65	Compass Park	Franklin	IN	473	171	135	167	36.2%	28.5%	35.3%
66	Mennonite Village	Albany	OR	472	304	126	42	64.4%	26.7%	8.9%
67	Virginia Mennonite Retirement Community	Harrisonburg	VA	472	266	86	120	56.4%	18.2%	25.4%
68	Meadowood Corporation	Worcester	PA	471	339	73	59	72.0%	15.5%	12.5%
69	Horizon House	Seattle	WA	468	378	90	0	80.8%	19.2%	0.0%
70	Epworth Villa	Oklahoma City	OK	464	263	114	87	56.7%	24.6%	18.8%
71	Masonic Village At Burlington	Burlington	NJ	463	233	87	143	50.3%	18.8%	30.9%
72	O'Connor Woods	Stockton	CA	461	245	116	100	53.1%	25.2%	21.7%
73	Homestead Village, Inc.	Lancaster	PA	460	374	26	60	81.3%	5.7%	13.0%
74	St. Mark Village	Palm harbor	FL	458	253	128	77	55.2%	27.9%	16.8%
75	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%

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

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

2023 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	Mercy Ridge, Inc.	Timonium	MD	455	408	47	0	89.7%	10.3%	0.0%
77	White Horse Village	Newtown Square	PA	454	331	48	75	72.9%	10.6%	16.5%
78	Lutheran Social Services of Upstate New York	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
79	The Highlands at Wyomissing	Wyomissing	PA	445	302	63	80	67.9%	14.2%	18.0%
80	Orlando Senior Health Network	Orlando	FL	444	189	87	168	42.6%	19.6%	37.8%
81	Greenwood Village South	Greenwood	IN	442	262	43	137	59.3%	9.7%	31.0%
82	St. Paul Homes	Greenville	PA	442	106	144	192	24.0%	32.6%	43.4%
83	North Hill	Needham	MA	438	321	45	72	73.3%	10.3%	16.4%
84	Seabury	Bloomfield	CT	437	249	116	72	57.0%	26.5%	16.5%
85	Good Samaritan Home of Quincy	Quincy	IL	437	180	54	203	41.2%	12.4%	46.5%
86	Fellowship Community fka Bible Fellowship Church Homes	Whitehall	PA	437	151	165	121	34.6%	37.8%	27.7%
87	Penney Retirement Community, Inc.	Penney Farms	FL	435	310	75	50	71.3%	17.2%	11.5%
88	Carol Woods Retirement	Chapel Hill	NC	434	315	89	30	72.6%	20.5%	6.9%
89	Arbor Acres United Methodist Retirement Community, Inc.	Winston-Salem	NC	433	253	97	83	58.4%	22.4%	19.2%
90	Marquette	Indianapolis	IN	432	306	69	57	70.8%	16.0%	13.2%
91	The Trezevant Episcopal Home	Memphis	TN	429	221	104	104	51.5%	24.2%	24.2%
92	Dunwoody Village	Newtown Square	PA	426	264	81	81	62.0%	19.0%	19.0%
93	Westminster Canterbury of Lynchburg	Lynchburg	VA	423	264	54	105	62.4%	12.8%	24.8%
94	Laurel Lake Retirement Community	Hudson	OH	421	290	56	75	68.9%	13.3%	17.8%
95	Peter Becker Community	Harleysville	PA	420	280	68	72	66.7%	16.2%	17.1%
96	Jefferson's Ferry	South Setauket	NY	419	299	60	60	71.4%	14.3%	14.3%
97	Capital Manor	Salem	OR	416	299	117	0	71.9%	28.1%	0.0%
98	The Glenridge on Palmer Ranch, Inc.	Sarasota	FL	414	304	49	61	73.4%	11.8%	14.7%
99	Westminster Village, Inc.	Bloomington	IL	411	243	72	96	59.1%	17.5%	23.4%
100	Friendship Village of Dublin	Dublin	OH	408	303	55	50	74.3%	13.5%	12.3%

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

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

2023 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
101	Southminster, Inc.	Charlotte	NC	407	322	25	60	79.1%	6.1%	14.7%
102	Oak Hammock at the University of Florida	Gainesville	FL	406	269	64	73	66.3%	15.8%	18.0%
103	Broadmead, Inc.	Cockeysville	MD	402	300	40	62	74.6%	10.0%	15.4%
104	Quarryville Presbyterian Retirement Community	Quarryville	PA	401	222	69	110	55.4%	17.2%	27.4%
105	EdenHill Communities, Inc.	New Braunfels	TX	401	147	67	187	36.7%	16.7%	46.6%
106	Lutheran Social Ministries of New Jersey at Crane's Mill	West Caldwell	NJ	400	274	70	56	68.5%	17.5%	14.0%
107	Bay Village of Sarasota, Inc.	Sarasota	FL	399	282	22	95	70.7%	5.5%	23.8%
108	Peconic Landing	Greenepoint	NY	398	296	42	60	74.4%	10.6%	15.1%
109	Pleasant View Communities	Manheim	PA	398	188	95	115	47.2%	23.9%	28.9%
110	The Pines at Davidson	Davidson	NC	397	292	30	75	73.6%	7.6%	18.9%
111	Westminster Village North	Terre Haute	IN	397	158	91	148	39.8%	22.9%	37.3%
112	Galloway Ridge	Pittsboro	NC	396	300	56	40	75.8%	14.1%	10.1%
113	The Pines at Whiting	Manchester	NJ	396	234	96	66	59.1%	24.2%	16.7%
114	Frasier	Boulder	CO	395	303	38	54	76.7%	9.6%	13.7%
115	Pennswood Village	Newtown	PA	395	301	41	53	76.2%	10.4%	13.4%
116	Pennybyrn aka Maryfield, Inc.	High Point	NC	395	222	48	125	56.2%	12.2%	31.6%
117	Brandermill Woods Retirement Community	Midlothian	VA	394	275	59	60	69.8%	15.0%	15.2%
118	Willamette View Inc.	Portland	OR	393	300	87	6	76.3%	22.1%	1.5%
119	Kahala Nui	Honolulu	HI	393	270	63	60	68.7%	16.0%	15.3%
120	Dallas Retirement Village	Dallas	OR	393	187	85	121	47.6%	21.6%	30.8%
121	Westminster Canterbury of the Blue Ridge	Charlottesville	VA	389	280	57	52	72.0%	14.7%	13.4%
122	Elim Park Baptist Home, Inc.	Cheshire	CT	389	257	42	90	66.1%	10.8%	23.1%
123	Still Hopes Episcopal Retirement Community	West Columbia	SC	388	272	46	70	70.1%	11.9%	18.0%
124	Vicar's Landing aka Life Care Ponte Vedra, Inc.	Ponte Vedra Beach	FL	386	288	38	60	74.6%	9.8%	15.5%
125	Foulkeways at Gwynedd	Gwynedd	PA	386	258	82	46	66.8%	21.2%	11.9%

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

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

2023 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
126	Mease Life Inc. – A LifePlan Community fka Mease Manor	Dunedin	FL	386	190	134	62	49.2%	34.7%	16.1%
127	The Hill at Whitemarsh	Lafayette Hill	PA	382	294	28	60	77.0%	7.3%	15.7%
128	Mt. San Antonio Gardens	Pomona	CA	382	243	91	48	63.6%	23.8%	12.6%
129	The Osborn	Rye	NY	382	208	90	84	54.5%	23.6%	22.0%
130	Snyder Village	Metamora	IL	381	210	65	106	55.1%	17.1%	27.8%
131	Warm Hearth Village	Blacksburg	VA	380	170	150	60	44.7%	39.5%	15.8%
132	Butterfield Trail Village, Inc.	Fayetteville	AR	376	274	15	87	72.9%	4.0%	23.1%
133	The Meth-Wick Community	Cedar Rapids	IA	376	247	60	69	65.7%	16.0%	18.4%
134	Edenwald	Towson	MD	375	264	62	49	70.4%	16.5%	13.1%
135	Heritage Community of Kalamazoo	Kalamazoo	MI	374	146	138	90	39.0%	36.9%	24.1%
136	Salemtowne	Winston-Salem	NC	373	221	52	100	59.2%	13.9%	26.8%
137	Friendship Village of Kalamazoo	Kalamazoo	MI	372	232	83	57	62.4%	22.3%	15.3%
138	St. James Place	Baton Rouge	LA	372	216	66	90	58.1%	17.7%	24.2%
139	Saint John's Communities, Inc.	Milwaukee	WI	370	295	50	25	79.7%	13.5%	6.8%
140	Brethren Hillcrest Homes	La Verne	CA	370	239	72	59	64.6%	19.5%	15.9%
141	Casa Dorinda	Montecito	CA	368	278	90	0	75.5%	24.5%	0.0%
142	Tabor Hills	Naperville	IL	368	104	95	169	28.3%	25.8%	45.9%
143	Friendship Haven	Fort Dodge	IA	367	108	104	155	29.4%	28.3%	42.2%
144	Peabody Retirement Community	North Manchester	IN	367	57	118	192	15.5%	32.2%	52.3%
145	Village On The Isle	Venice	FL	366	238	64	64	65.0%	17.5%	17.5%
146	Evergreen Retirement Community	Oshkosh	WI	363	203	80	80	55.9%	22.0%	22.0%
147	Ginger Cove aka Annapolis Life Care, Inc.	Annapolis	MD	358	232	126	0	64.8%	35.2%	0.0%
148	Atherton Baptist Homes	Alhambra	CA	354	219	36	99	61.9%	10.2%	28.0%
149	Westerwood fka Friendship Village of Columbus	Columbus	OH	353	198	80	75	56.1%	22.7%	21.2%
150	Friendsview Retirement Community aka Friendsview Manor	Newberg	OR	352	252	100	0	71.6%	28.4%	0.0%

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

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

2023 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
151	Brookhaven at Lexington	Lexington	MA	351	290	49	12	82.6%	14.0%	3.4%
152	Niagara Lutheran Health System; Greenfields Continuing Care Community	Lancaster	NY	349	92	97	160	26.4%	27.8%	45.8%
153	Wake Robin Corporation	Shelburne	VT	348	250	41	57	71.8%	11.8%	16.4%
154	Heath Village	Hackettstown	NJ	348	200	40	108	57.5%	11.5%	31.0%
155	Plymouth Place	La Grange Park	IL	346	182	78	86	52.6%	22.5%	24.9%
156	Lions Gate	Voorhees	NJ	344	164	70	110	47.7%	20.3%	32.0%
157	Meadowlark Hills	Manhattan	KS	343	163	46	134	47.5%	13.4%	39.1%
158	Fairmount Homes	Ephrata	PA	343	155	74	114	45.2%	21.6%	33.2%
159	Brewster Place	Topeka	KS	342	217	28	97	63.5%	8.2%	28.4%
160	St. Anne's Retirement Community	Columbia	PA	339	168	52	119	49.6%	15.3%	35.1%
161	Mayflower Retirement Center, Inc.	Winter Park	FL	337	246	31	60	73.0%	9.2%	17.8%
162	Larksfield Place Retirement Community	Wichita	KS	337	185	72	80	54.9%	21.4%	23.7%
163	The Redwoods, A Community of Seniors	Mill Valley	CA	336	148	130	58	44.0%	38.7%	17.3%
164	Burcham Hills	East Lansing	MI	336	78	125	133	23.2%	37.2%	39.6%
165	Nazareth Living Center	St. Louis	MO	335	100	114	121	29.9%	34.0%	36.1%
166	Sunnyside Village	Sarasota	FL	331	226	45	60	68.3%	13.6%	18.1%
167	Plymouth Harbor, Inc.	Sarasota	FL	331	215	60	56	65.0%	18.1%	16.9%
168	Wesley Commons	Greenwood	SC	331	191	60	80	57.7%	18.1%	24.2%
169	Spanish Cove Retirement Village	Yukon	OK	329	217	55	57	66.0%	16.7%	17.3%
170	Beacon Hill at Eastgate	Grand Rapids	MI	328	216	83	29	65.9%	25.3%	8.8%
171	Shenandoah Valley Westminster-Canterbury	Winchester	VA	327	216	60	51	66.1%	18.3%	15.6%
172	The Forest at Duke	Durham	NC	325	235	32	58	72.3%	9.8%	17.8%
173	Trinity Woods, Inc. fka Oklahoma Methodist Manor	Tulsa	OK	323	211	40	72	65.3%	12.4%	22.3%
174	Frederick Living	Zieglerville	PA	322	160	101	61	49.7%	31.4%	18.9%
175	Woodside Senior Communities	Green Bay	WI	322	75	117	130	23.3%	36.3%	40.4%

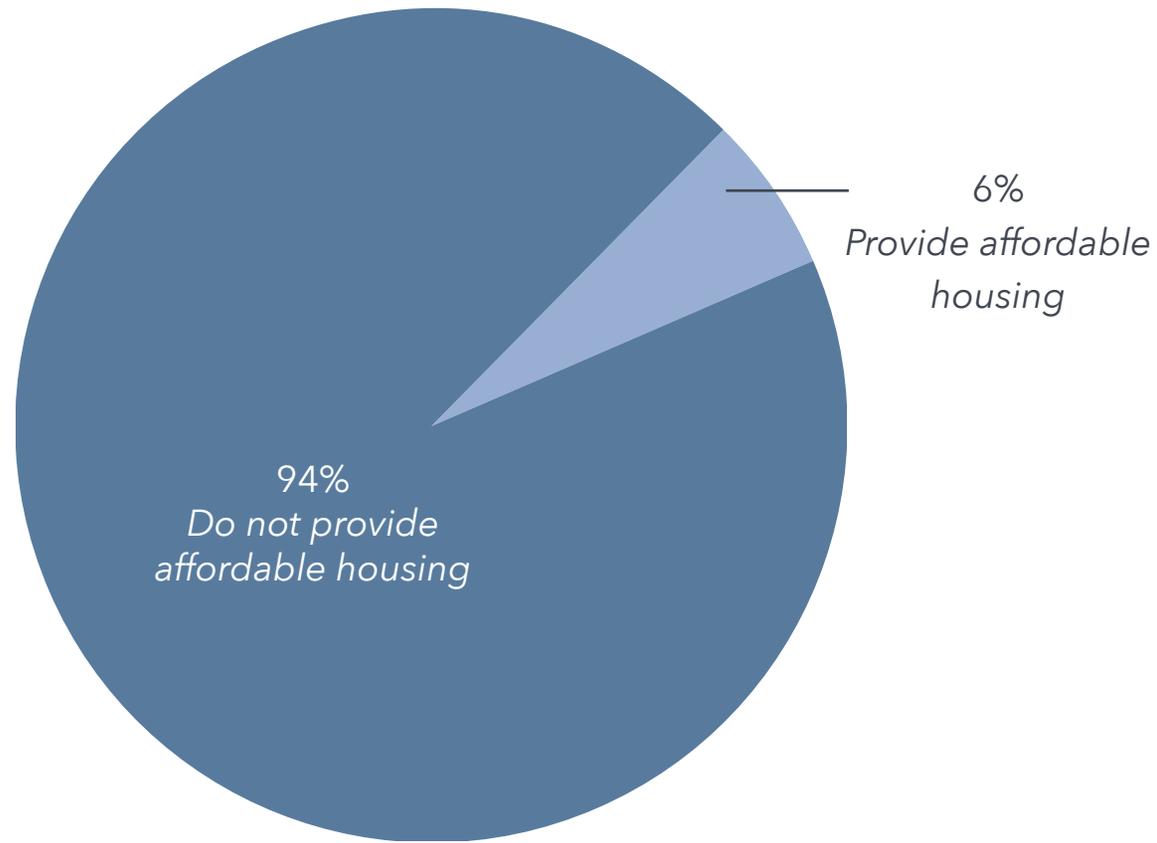
## Additional Listings: Single-Campus Senior Living Communities (Continued)

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

2023 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
176	Westminster Village	Normal	AZ	321	238	23	60	74.1%	7.2%	18.7%
177	Carlyle Place	Macon	GA	321	226	55	40	70.4%	17.1%	12.5%
178	St. Martin's in the Pines	Birmingham	AL	319	100	91	128	31.3%	28.5%	40.1%
179	Waverly Heights	Gladwyne	PA	318	219	68	31	68.9%	21.4%	9.7%
180	Attic Angel Community	Middleton	WI	317	123	194	0	38.8%	61.2%	0.0%
181	Foxdale Village	State College	PA	316	205	65	46	64.9%	20.6%	14.6%
182	The Oaks at Bartlett	Bartlett	IL	316	164	32	120	51.9%	10.1%	38.0%
183	Carleton-Willard Homes, Inc.	Bedford	MA	313	157	56	100	50.2%	17.9%	31.9%
184	Hartsfield Village	Munster	IN	312	106	94	112	34.0%	30.1%	35.9%
185	The Briarwood Community	Worcester	MA	311	193	36	82	62.1%	11.6%	26.4%
186	Sierra Winds	Peoria	AZ	310	240	0	70	77.4%	0.0%	22.6%
187	The Sarah Community	St. Louis	MO	309	106	99	105	34.3%	32.0%	34.0%
188	Edgewood	North Andover	MA	303	243	0	60	80.2%	0.0%	19.8%
189	Woodland Pond at New Paltz	New Paltz	NY	301	201	60	40	66.8%	19.9%	13.3%
190	Brevillier Village	Erie	PA	300	95	120	85	31.7%	40.0%	28.3%
191	California Armenian Home and The Vineyards	Fresno	CA	300	60	121	119	20.0%	40.3%	39.7%
192	Legacy Pointe at UCF	Oviedo	FL	298	170	80	48	57.0%	26.8%	16.1%
193	Clement Manor	Greenfield	WI	297	140	107	50	47.1%	36.0%	16.8%
194	The Woodlands at Furman	Greenville	SC	296	202	64	30	68.2%	21.6%	10.1%
195	Spring Harbor at Green Island	Columbus	GA	296	196	60	40	66.2%	20.3%	13.5%
196	Rose Villa	Portland	OR	295	263	16	16	89.2%	5.4%	5.4%
197	Duncaster, Inc.	Bloomfield	CT	294	191	43	60	65.0%	14.6%	20.4%
198	Immanuel Lutheran Communities	Kalispell	MT	291	104	64	123	35.7%	22.0%	42.3%
199	Swiss Village Inc.	Berne	IN	291	87	76	128	29.9%	26.1%	44.0%
200	Piper Shores	Scarborough	ME	290	200	50	40	69.0%	17.2%	13.8%

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

## *Single-Campus Providers With Affordable Housing*

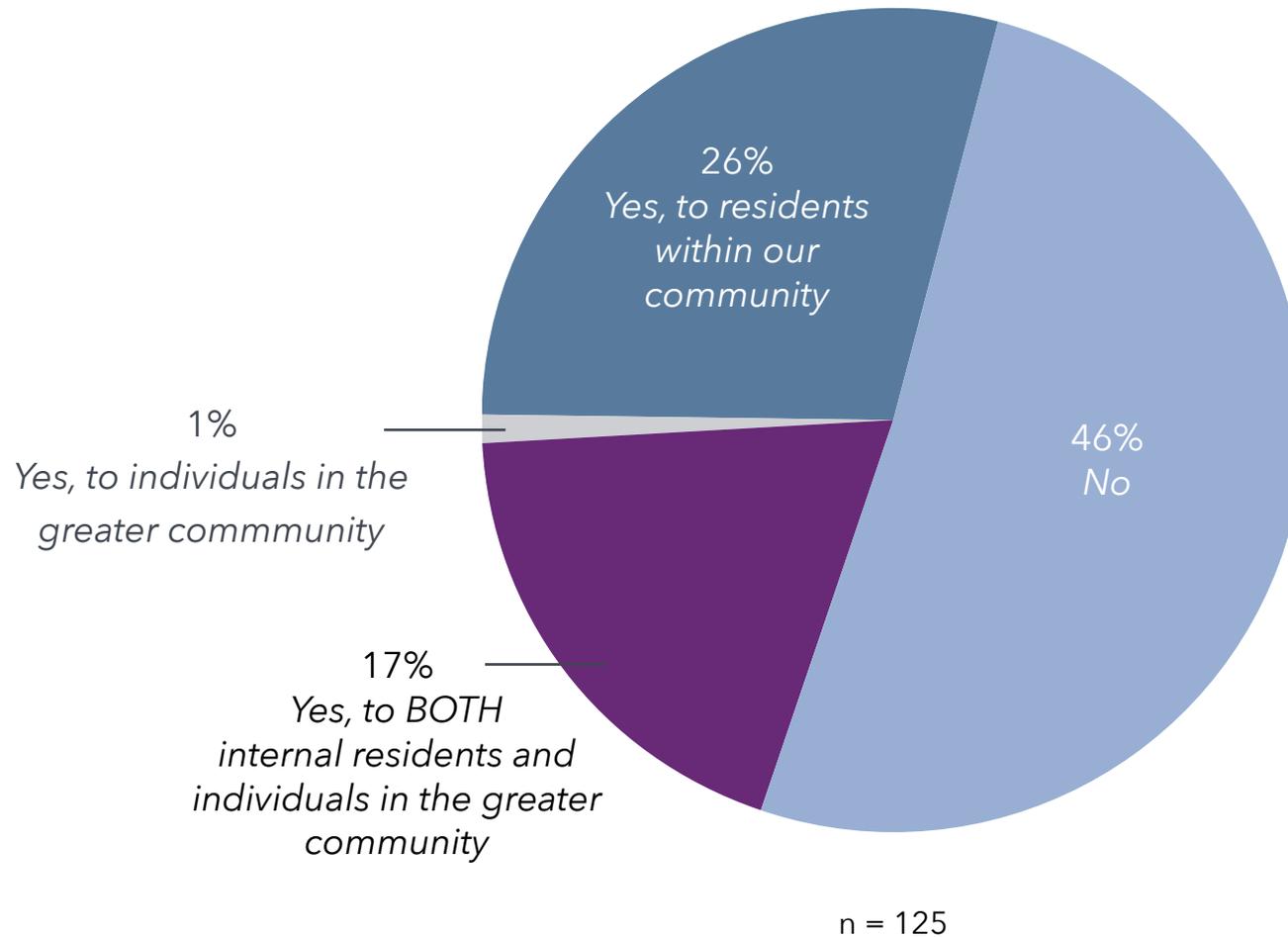


n = 11

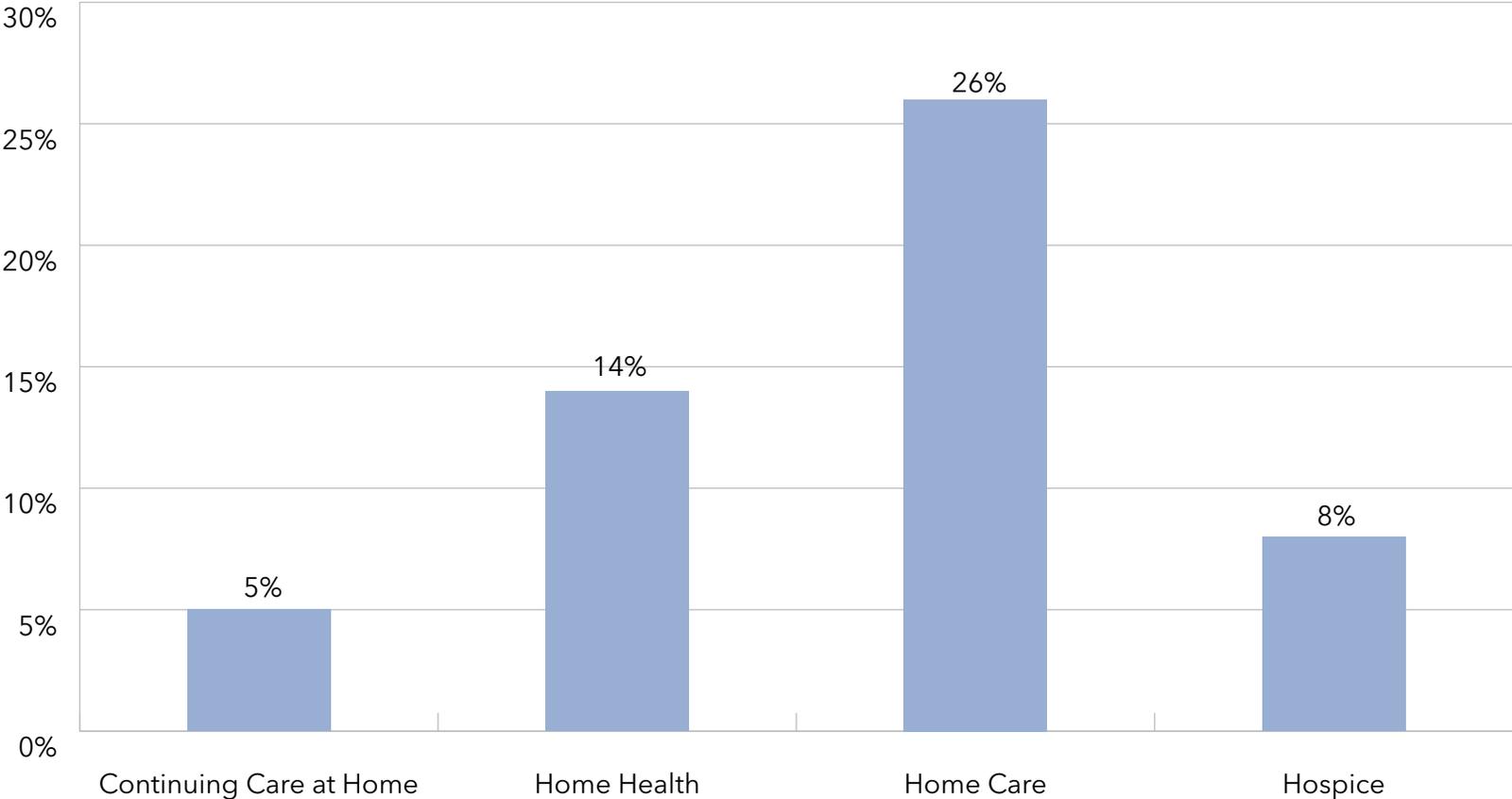
## Additional Listings: The Largest 200 Single-Campus Senior Living Communities

### Single-Campus Providers of HCBS

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



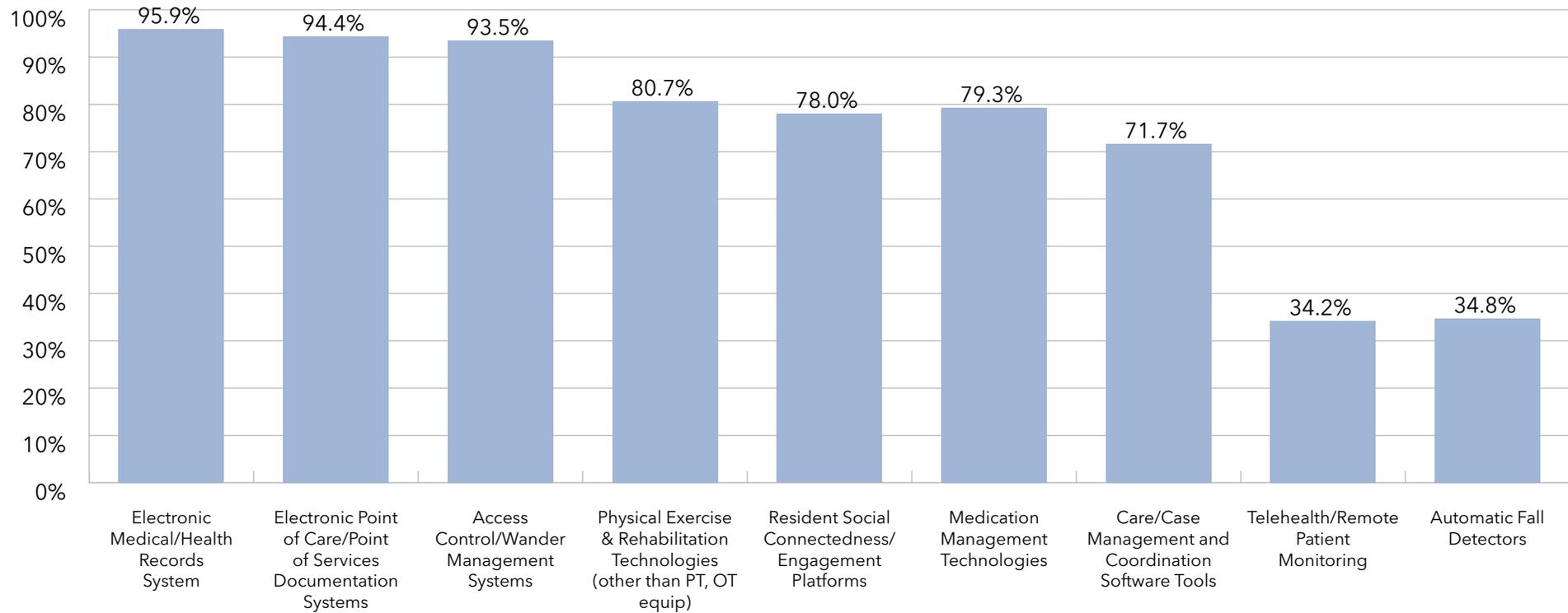
# Additional Listings: The Largest 200 Single-Campus Senior Living Communities Offering: Hospice, Home Care, Home Health & Continuing Care at Home



n = 125

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

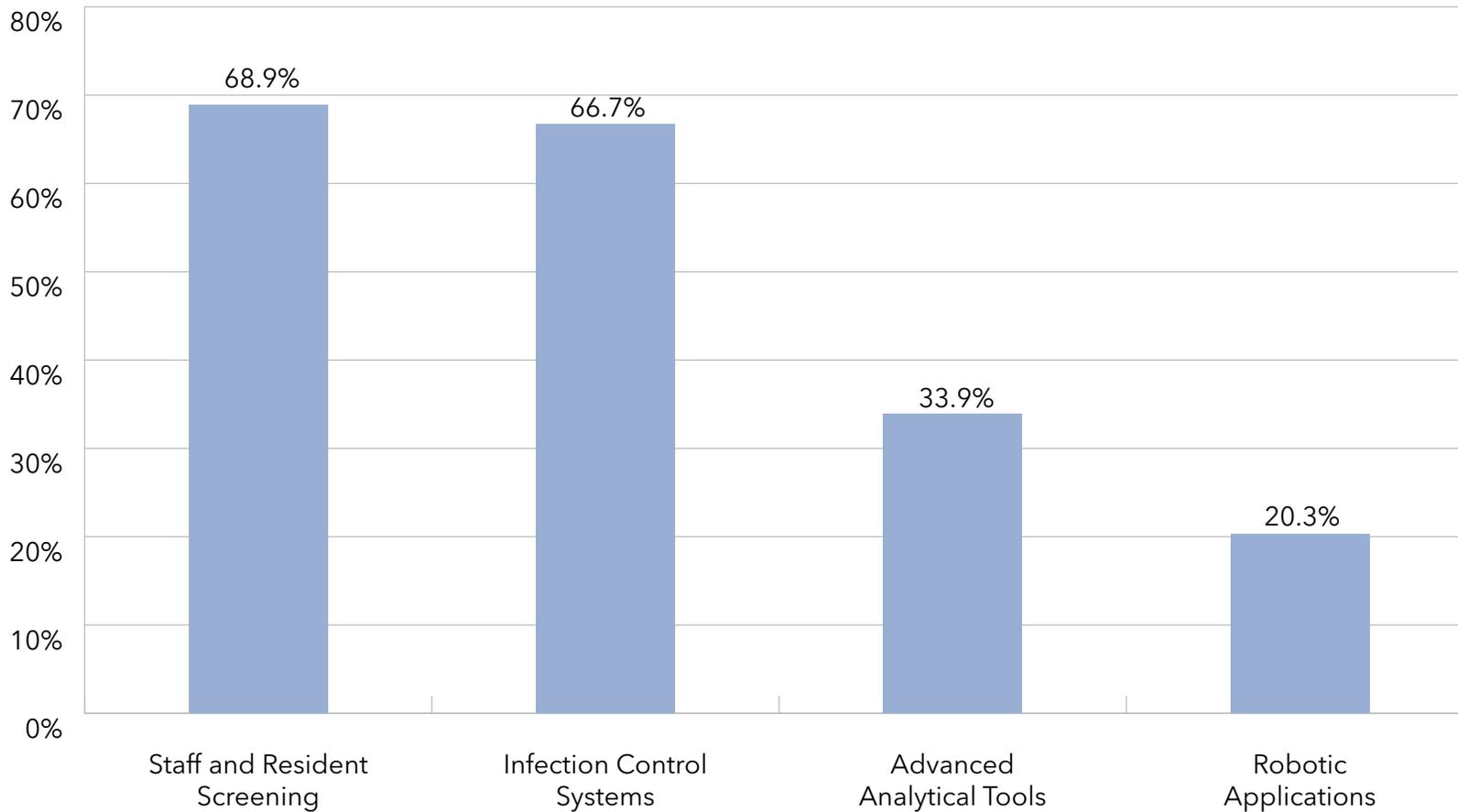
### Technology Adoption: Single-Campus Providers



n = 122 (avg)

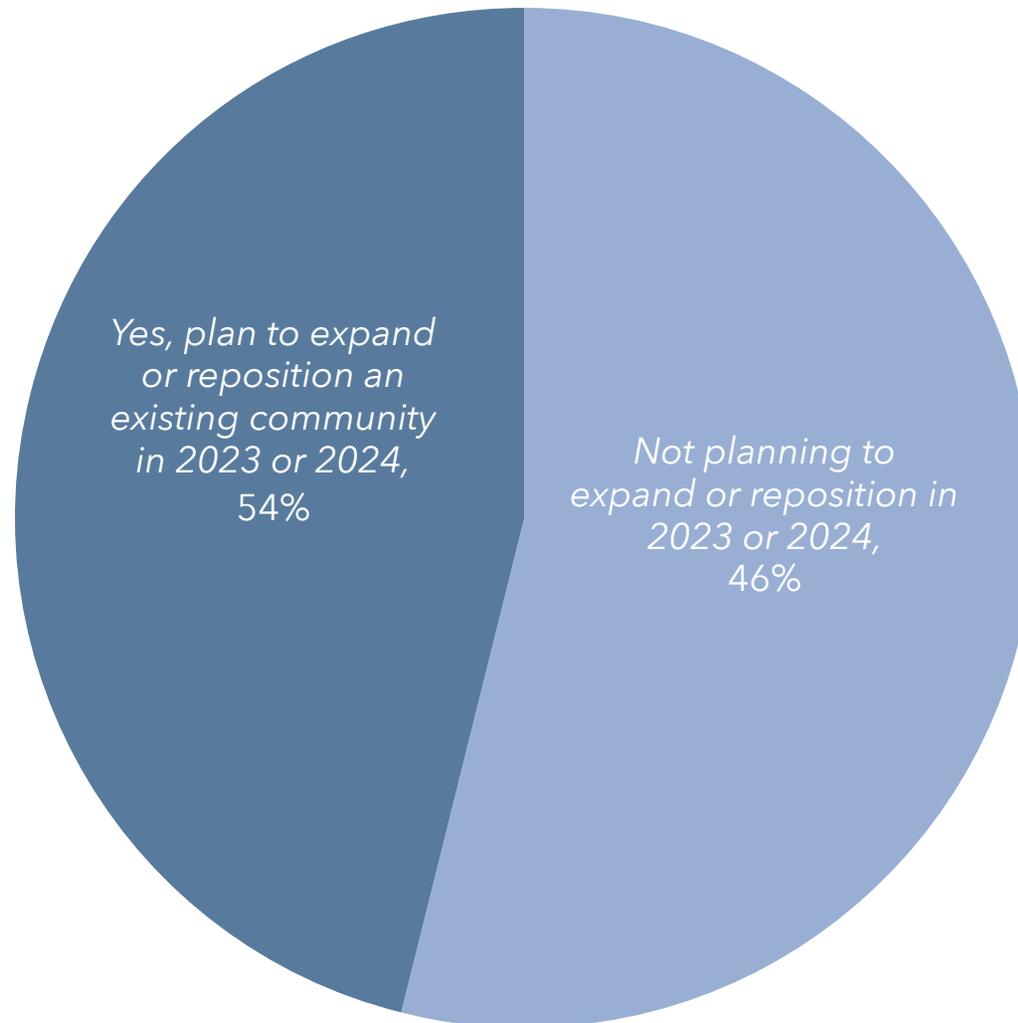
## Additional Listings: The Largest 200 Single-Campus Senior Living Communities

### Technology Adoption: Single-Campus Providers



n = 120 (avg)

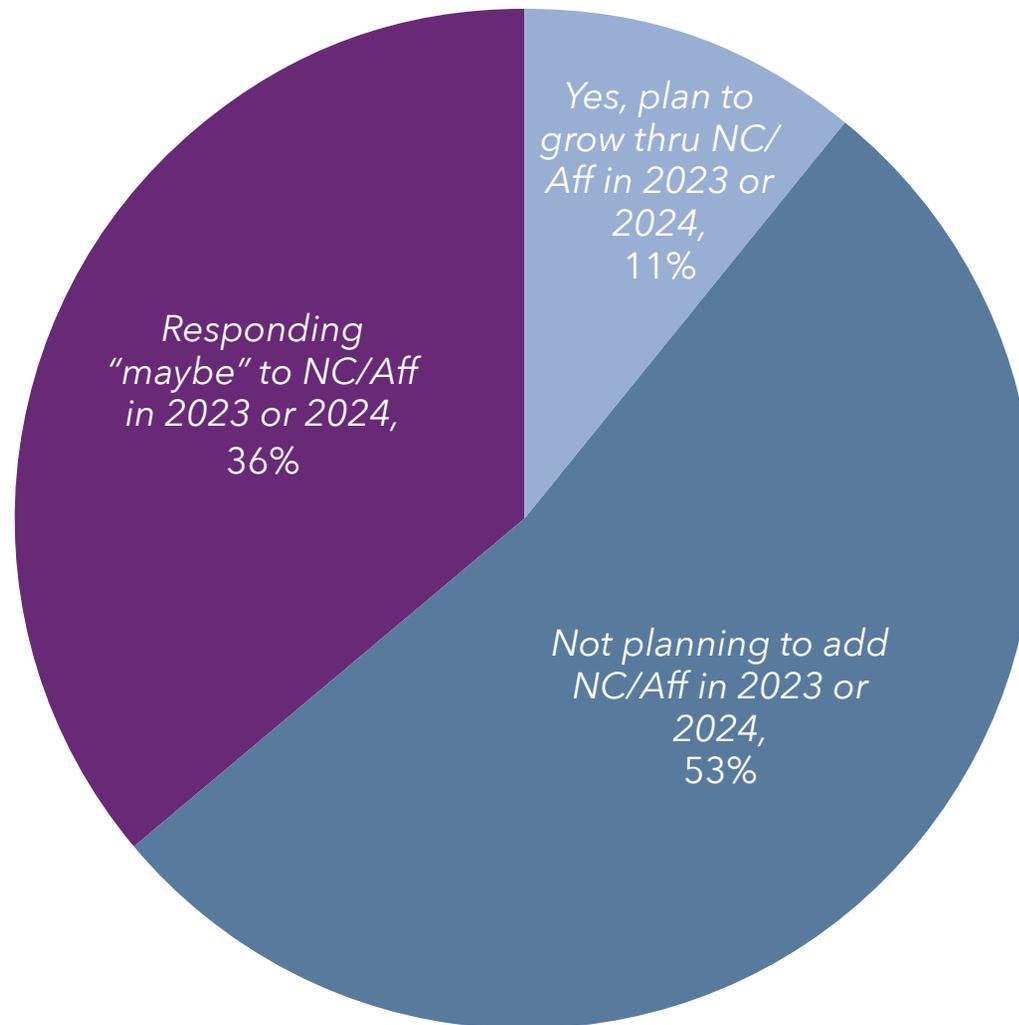
Additional Listings: The Largest 200 Single-Campus Senior Living Communities  
*Future Growth: Single-Campus Providers Planning to Expand or Reposition in Next Two Years*



N= 128

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

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





## Additional Listings: Largest Individual Campuses

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

2023 Rank	2022 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
1	1	Riderwood Village	National Senior Communities	Silver Spring	MD	2,153	1,790	246	117	83.1%	11.4%	5.4%
2	2	Shell Point Retirement Community		Fort Myers	FL	1,869	1,334	355	180	71.4%	19.0%	9.6%
3	3	Oak Crest	National Senior Communities	Parkville	MD	1,829	1,498	171	160	81.9%	9.3%	8.7%
4	4	Charlestown Community		Catonsville	MD	1,713	1,402	208	103	81.8%	12.1%	6.0%
5	5	Greenspring Village	National Senior Communities	Springfield	VA	1,685	1,380	220	85	81.9%	13.1%	5.0%
6	6	Ann's Choice	National Senior Communities	Warminster	PA	1,674	1,472	126	76	87.9%	7.5%	4.5%
7	7	Masonic Village at Elizabethtown	Masonic Villages of the Grand Lodge of Pennsylvania	Elizabethtown	PA	1,595	1,009	133	453	63.3%	8.3%	28.4%
8	8	Brooksby Village	National Senior Communities	Peabody	MA	1,575	1,339	156	80	85.0%	9.9%	5.1%
9	9	John Knox Village		Lee's Summit	MO	1,397	1,022	182	193	73.2%	13.0%	13.8%
10	10	Maris Grove	National Senior Communities	Glen Mills	PA	1,293	1,116	89	88	86.3%	6.9%	6.8%
11	13	Ashby Ponds	National Senior Communities	Ashburn	VA	1,290	1,148	98	44	89.0%	7.6%	3.4%
12	11	Fox Run	National Senior Communities	Novi	MI	1,263	1,131	88	44	89.5%	7.0%	3.5%
13	12	Seabrook Village	National Senior Communities	Tinton Falls	NJ	1,240	1,053	96	91	84.9%	7.7%	7.3%
14	14	Linden Ponds	National Senior Communities	Hingham	MA	1,218	1,086	66	66	89.2%	5.4%	5.4%
15	15	Asbury Methodist Village	Asbury Communities	Gaithersburg	MD	1,128	810	133	185	71.8%	11.8%	16.4%
16	20	Willow Valley Lakes Manor	Willow Valley Communities	Lancaster	PA	1,078	774	177	127	71.8%	16.4%	11.8%
17	16	Highland Springs	National Senior Communities	Dallas	TX	1,077	1,077	0	0	100.0%	0.0%	0.0%
18	17	The Hebrew Home at Riverdale		Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
19	18	Cross Keys Village - The Brethren Home Community		New Oxford	PA	983	590	123	270	60.0%	12.5%	27.5%
20	19	Panorama		Lacey	WA	971	787	44	140	81.1%	4.5%	14.4%
21	21	John Knox Village of FL		Pompano Beach	FL	899	653	62	184	72.6%	6.9%	20.5%
22	23	Kissimmee Good Sam	The Evangelical Lutheran Good Samaritan Society	Kissimmee	FL	884	675	39	170	76.4%	4.4%	19.2%
23	24	Brethren Village		Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%
24	22	Friendship Village of Schaumburg	Friendship Senior Options	Schaumburg	IL	855	579	106	170	67.7%	12.4%	19.9%
25	25	Eagle's Trace	National Senior Communities	Houston	TX	836	836	0	0	100.0%	0.0%	0.0%

## Additional Listings: Largest Individual Campuses (continued)

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

2023 Rank	2022 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
26	27	St. John's Homes & Meadows		Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
27	33	Westminster Canterbury Richmond		Richmond	VA	807	486	163	158	60.2%	20.2%	19.6%
28	29	Rogue Valley Manor	Pacific Retirement Services	Medford	OR	806	605	97	104	75.1%	12.0%	12.9%
29	31	Greencroft Goshen	Greencroft Communities	Goshen	IN	803	435	128	240	54.2%	15.9%	29.9%
30	30	Garden Spot Village	Garden Spot Communities	New Holland	PA	799	621	105	73	77.7%	13.1%	9.1%
31	32	Heritage Pointe	United Methodist Memorial Home	Warren	IN	796	152	458	186	19.1%	57.5%	23.4%
32	34	Charles E. Smith Life Communities		Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
33	26	Mennonite Home Communities		Lancaster	PA	770	525	85	160	68.2%	11.0%	20.8%
34	35	Friendship Village of Tempe		Tempe	AZ	768	549	91	128	71.5%	11.8%	16.7%
35	37	The Wartburg Adult Care Community		Mount Vernon	NY	758	505	105	148	66.6%	13.9%	19.5%
36	38	Indian River Estates	Acts Retirement-Life Communities	Vero Beach	FL	754	574	60	120	76.1%	8.0%	15.9%
37	39	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	748	326	280	142	43.6%	37.4%	19.0%
38	40	Luther Manor	United Lutheran Program for the Aging	Wauwatosa	WI	744	381	158	205	51.2%	21.2%	27.6%
39	41	Laclede Groves	Lutheran Senior Services	Webster Groves	MO	740	360	130	250	48.6%	17.6%	33.8%
40	42	Bethany Lutheran Village		Dayton	OH	739	383	109	247	51.8%	14.7%	33.4%
41	43	Willow Valley Manor North	Willow Valley Communities	Lancaster	PA	735	495	91	149	67.3%	12.4%	20.3%
42	47	Glencroft Center for Modern Aging		Glendale	AZ	729	391	178	160	53.6%	24.4%	21.9%
43	45	Passavant Retirement Community	Lutheran SeniorLife	Zelienople	PA	729	256	214	259	35.1%	29.4%	35.5%
44	44	Otterbein Lebanon Retirement Community	Otterbein SeniorLife	Lebanon	OH	716	458	68	190	64.0%	9.5%	26.5%
45	46	Lakeview Village		Lenexa	KS	713	529	26	158	74.2%	3.6%	22.2%
46	50	Landis Homes	Landis Communities	Lititz	PA	698	514	81	103	73.6%	11.6%	14.8%
47	81	Tallgrass Creek	National Senior Communities	Overland Park	KS	693	593	56	44	85.6%	8.1%	6.3%
48	52	Beatitudes Campus		Phoenix	AZ	688	495	121	72	71.9%	17.6%	10.5%
49	53	MorseLife		West Palm Beach	FL	688	284	94	310	41.3%	13.7%	45.1%
50	101	St. Camillus		Wauwatosa	WI	686	440	196	50	64.1%	28.6%	7.3%

## Additional Listings: Largest Individual Campuses (continued)

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

2023 Rank	2022 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
51	55	Atlantic Shores Cooperative Association		Virginia Beach	VA	671	555	66	50	82.7%	9.8%	7.5%
52	56	Augustana Care Minneapolis	Cassia	Minneapolis	MN	671	366	0	305	54.5%	0.0%	45.5%
53	54	Friendship Village Sunset Hills	Friendship Village	St. Louis	MO	668	448	76	144	67.1%	11.4%	21.6%
54	51	Fleet Landing		Atlantic Beach	FL	665	482	118	65	72.5%	17.7%	9.8%
55	57	St. Ann's Community	St. Ann's of Greater Rochester	Rochester	NY	662	120	120	422	18.1%	18.1%	63.7%
56	58	Concordia Village of Tampa	Concordia Lutheran Ministries	Tampa	FL	661	333	165	163	50.4%	25.0%	24.7%
57	59	John Knox Village of Central Florida		Orange City	FL	654	455	49	150	69.6%	7.5%	22.9%
58	61	Plantation Estates	Acts Retirement-Life Communities	Matthews	NC	642	502	60	80	78.2%	9.3%	12.5%
59	60	Carolina Meadows, Inc.		Chapel Hill	NC	640	476	78	86	74.4%	12.2%	13.4%
60	NR	Waterman Communities		Mount Dora	FL	639	418	101	120	65.4%	15.8%	18.8%
61	62	Raybrook Manor	Holland Home	Grand Rapids	MI	638	299	238	101	46.9%	37.3%	15.8%
62	64	Tel Hai Retirement Community		Honey Brook	PA	635	406	100	129	63.9%	15.7%	20.3%
63	65	Army Residence Community		San Antonio	TX	634	465	78	91	73.3%	12.3%	14.4%
64	28	Westminster-Canterbury on Chesapeake Bay	Westminster-Canterbury on Chesapeake Bay	Virginia Beach	VA	634	446	80	108	70.3%	12.6%	17.0%
65	63	Miami Jewish Health		Miami	FL	633	95	100	438	15.0%	15.8%	69.2%
66	66	Loretto Brighton Campus	Loretto	Syracuse	NY	633	0	79	554	0.0%	12.5%	87.5%
67	67	The Village in Gainesville	SantaFe Senior Living	Gainesville	FL	630	497	133	0	78.9%	21.1%	0.0%
68	73	Westminster Oaks	Westminster Retirement Communities of Florida	Tallahassee	FL	630	413	97	120	65.6%	15.4%	19.0%
69	47	Rolling Green Village		Greenville	SC	626	502	50	74	80.2%	8.0%	11.8%
70	68	Mary's Woods at Marylhurst, Inc.		Lake Oswego	OR	626	478	148	0	76.4%	23.6%	0.0%
71	69	La Posada at Park Centre, Inc.		Green Valley	AZ	625	490	135	0	78.4%	21.6%	0.0%
72	70	VMP		West Allis	WI	624	294	180	150	47.1%	28.8%	24.0%
73	71	Copeland Oaks		Sebring	OH	621	320	125	176	51.5%	20.1%	28.3%
74	72	Ingleside at King Farm	Ingleside	Rockville	MD	619	366	75	178	59.1%	12.1%	28.8%
75	90	Presbyterian Village North	Forefront Living	Dallas	TX	616	365	145	106	59.3%	23.5%	17.2%

NR: Not Ranked in that year

## Additional Listings: Largest Individual Campuses (continued)

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

2023 Rank	2022 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
76	74	Fellowship Square-Tucson Campus	Christian Care Companies	Tucson	AZ	615	555	60	0	90.2%	9.8%	0.0%
77	75	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	41.6%	14.8%	43.6%
78	94	Otterbein Franklin Retirement Community	Otterbein SeniorLife	Franklin	OH	614	264	91	259	43.0%	14.8%	42.2%
79	149	Manor Park Inc.		Midland	TX	607	318	114	175	52.4%	18.8%	28.8%
80	77	Twin Lakes Community		Burlington	NC	606	434	68	104	71.6%	11.2%	17.2%
81	78	Ohio Living Breckenridge Village	Ohio Living	Willoughby	OH	603	453	42	108	75.1%	7.0%	17.9%
82	80	Croasdaile Village	UMRH, Inc.	Durham	NC	600	430	56	114	71.7%	9.3%	19.0%
83	79	St. Andrew's Estates	Acts Retirement-Life Communities	Boca Raton	FL	592	433	70	89	73.1%	11.8%	15.0%
84	131	Givens Estates	Givens Communities	Asheville	NC	588	484	45	59	82.3%	7.7%	10.0%
85	82	Springmoor Life Care Retirement Community		Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
86	76	Messiah Village	Messiah Lifeways	Mechanicsburg	PA	581	288	138	155	49.6%	23.8%	26.7%
87	84	Kirby Pines Lifecare Community	Retirement Companies of America	Memphis	TN	580	396	94	90	68.3%	16.2%	15.5%
88	85	Jewish Senior Living Group		San Francisco	CA	580	0	202	378	0.0%	34.8%	65.2%
89	86	Oakwood Village University Woods	Oakwood Lutheran Senior Ministries	Madison	WI	577	382	100	95	66.2%	17.3%	16.5%
90	87	The Village at Rockville	National Lutheran Communities & Services	Rockville	MD	577	259	18	300	44.9%	3.1%	52.0%
91	83	Moorings Park	The Moorings, Inc.	Naples	FL	576	399	71	106	69.3%	12.3%	18.4%
92	88	Friendship Village Chesterfield	Friendship Village	St. Louis	MO	575	362	92	121	63.0%	16.0%	21.0%
93	89	Hoosier Village	BHI Senior Living	Indianapolis	IN	572	279	216	77	48.8%	37.8%	13.5%
94	91	Asbury Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	70.3%	17.6%	12.1%
95	104	Brookview	Menno Haven	Chambersburg	PA	569	380	89	100	66.8%	15.6%	17.6%
96	93	Richfield Living		Salem	VA	567	97	226	244	17.1%	39.9%	43.0%
97	95	Fellowship Square-Phoenix Campus	Christian Care Companies	Phoenix	AZ	559	404	87	68	72.3%	15.6%	12.2%
98	96	Bristol Village	National Church Residences	Waverly	OH	558	455	46	57	81.5%	8.2%	10.2%
99	97	East Ridge Retirement Village	SantaFe Senior Living	Cutler Bay	FL	557	247	176	134	44.3%	31.6%	24.1%
100	99	Masonicare at Ashlar Village	Masonicare	Wallingford	CT	553	362	191	0	65.5%	34.5%	0.0%

## Additional Listings: Largest Individual Campuses (continued)

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

2023 Rank	2022 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
101	101	Masonic Care Community of New York		Utica	NY	551	151	80	320	27.4%	14.5%	58.1%
102	103	Carroll Lutheran Village	Lutheran Social Ministries of Maryland	Westminster	MD	549	396	50	103	72.1%	9.1%	18.8%
103	132	Covenant Living at Windsor Park	Covenant Living Communities & Services	Carol Stream	IL	546	375	103	68	68.7%	18.9%	12.5%
104	105	Fountainview at Eisenburg Village	Los Angeles Jewish Home	Reseda	CA	545	108	271	166	19.8%	49.7%	30.5%
105	106	Breton Woods	Holland Home	Kentwood	MI	544	441	45	58	81.1%	8.3%	10.7%
106	107	Medford Leas		Medford	NJ	543	401	75	67	73.8%	13.8%	12.3%
107	109	The RiverWoods at Exeter	The RiverWoods Group	Exeter	NH	542	393	71	78	72.5%	13.1%	14.4%
108	120	Rydal Park	HumanGood	Jenkintown	PA	541	373	54	114	68.9%	10.0%	21.1%
109	110	Phoebe Allentown	Phoebe Ministries	Allentown	PA	541	88	58	395	16.3%	10.7%	73.0%
110	111	Casa de las Campanas		San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
111	112	Good Samaritan Village of Hastings	The Evangelical Lutheran Good Samaritan Society	Hastings	NE	540	324	51	165	60.0%	9.4%	30.6%
112	92	The Philadelphia Protestant Home		Philadelphia	PA	539	248	175	116	46.0%	32.5%	21.5%
113	NR	Westminster		Austin	TX	538	409	74	55	76.0%	13.8%	10.2%
114	114	Mission Ridge / St. John's Lutheran Home	St. John's United	Billings	MT	534	122	226	186	22.8%	42.3%	34.8%
115	113	Royal Oaks Lifeplan Community		Sun City	AZ	533	358	175	0	67.2%	32.8%	0.0%
116	116	Paradise Valley Estates		Fairfield	CA	529	391	78	60	73.9%	14.7%	11.3%
117	122	Cypress Cove at HealthPark Florida		Fort Myers	FL	529	381	88	60	72.0%	16.6%	11.3%
118	118	Luther Acres Senior Living Community	LutherCare	Lititz	PA	528	352	70	106	66.7%	13.3%	20.1%
119	119	Magnolia Manor of Americus	Magnolia Manor	Americus	GA	528	105	187	236	19.9%	35.4%	44.7%
120	121	Pine Run Retirement Community		Doylestown	PA	527	291	146	90	55.2%	27.7%	17.1%
121	123	Blue Skies of Texas East	Blue Skies of Texas	San Antonio	TX	525	371	78	76	70.7%	14.9%	14.5%
122	115	Aldersgate United Methodist Retirement Community, Inc.		Charlotte	NC	525	300	105	120	57.1%	20.0%	22.9%
123	124	Westminster Place	Presbyterian Homes, Inc.	Evanston	IL	525	249	88	188	47.4%	16.8%	35.8%
124	125	Cristwood Retirement Community	CRISTA Senior Living	Seattle	WA	524	276	81	167	52.7%	15.5%	31.9%
125	126	Abbey Delray	Lifespace Communities	Delray Beach	FL	520	342	78	100	65.8%	15.0%	19.2%

NR: Not Ranked in that year

## Additional Listings: Largest Individual Campuses (continued)

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

2023 Rank	2022 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
126	127	Boutwells Landing	Presbyterian Homes and Services	Oak Park Heights	MN	520	316	96	108	60.8%	18.5%	20.8%
127	128	Lutheran Home	Lutheran Life Communities	Arlington Heights	IL	520	0	136	384	0.0%	26.2%	73.8%
128	139	The Lakewood	Lifespire of Virginia	Richmond	VA	517	347	74	96	67.1%	14.3%	18.6%
129	129	Wesley Willows	Wesley Willows	Rockford	IL	517	260	166	91	50.3%	32.1%	17.6%
130	131	Cardinal Carberry Campus	Cardinal Ritter Senior Services	Saint Louis	MO	517	207	80	230	40.0%	15.5%	44.5%
131	133	The Lutheran Home		Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
132	134	Wesleyan Homes		Georgetown	TX	513	247	266	0	48.1%	51.9%	0.0%
133	135	Wesley Homes Des Moines	Wesley	Des Moines	WA	512	325	39	148	63.5%	7.6%	28.9%
134	136	Homewood at Plum Creek	Homewood Retirement Centers	Hanover	PA	512	294	98	120	57.4%	19.1%	23.4%
135	137	The Advent Christian Village		Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
136	138	The Buckingham		Houston	TX	510	308	110	92	60.4%	21.6%	18.0%
137	140	Menno Village	Menno Haven	Chambersburg	PA	509	224	89	196	44.0%	17.5%	38.5%
138	141	Ingleside at Rock Creek	Ingleside	Washington	DC	508	232	91	185	45.7%	17.9%	36.4%
139	98	Asbury Place Maryville	Asbury Communities	Maryville	TN	507	261	92	154	51.5%	18.1%	30.4%
140	130	CC Young		Dallas	TX	507	223	160	124	44.0%	31.6%	24.5%
141	144	Walker Campus	Walker Methodist	Minneapolis	MN	504	128	0	376	25.4%	0.0%	74.6%
142	145	Deerfield Episcopal Retirement Community, Inc.		Asheville	NC	503	379	62	62	75.3%	12.3%	12.3%
143	142	Covenant Living at The Holmstad	Covenant Living Communities & Services	Batavia	IL	501	354	62	85	70.7%	12.4%	17.0%
144	146	Londonderry Village		Palmyra	PA	500	374	38	88	74.8%	7.6%	17.6%
145	143	Carolina Village, Inc.		Hendersonville	NC	497	379	60	58	76.3%	12.1%	11.7%
146	148	Havenwood Heritage Heights	United Church of Christ Retirement Community, Inc.	Concord	NH	497	347	55	95	69.8%	11.1%	19.1%
147	147	Westminster Winter Park	Westminster Retirement Communities of Florida	Winter Park	FL	496	347	69	80	70.0%	13.9%	16.1%
148	NR	Meramec Bluffs	Lutheran Senior Services	Ballwin	MO	495	289	78	128	58.4%	15.8%	25.9%
149	NR	Bridgewater Retirement Community		Bridgewater	VA	494	269	98	127	54.5%	19.8%	25.7%
150	NR	The Estates at Carpenters		Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%

NR: Not Ranked in that year

## Additional Listings: Largest Individual Campuses (continued)

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

2023 Rank	2022 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
151	150	Riddle Village		Media,	PA	493	358	49	86	72.6%	9.9%	17.4%
152	NR	Crane's Mill		West Caldwell	NJ	493	270	114	109	54.8%	23.1%	22.1%
153	NR	Friendship Village of Bloomington	Lifespace Communities	Bloomington	MN	491	381	21	89	77.6%	4.3%	18.1%
154	NR	Moravian Manor Communities		Lititz	PA	489	315	55	119	64.4%	11.2%	24.3%
155	NR	The Wesleyan		Georgetown	TX	488	262	84	142	53.7%	17.2%	29.1%
156	NR	Lanier Village Estates	Acts Retirement-Life Communities	Gainesville	GA	486	367	55	64	75.5%	11.3%	13.2%
157	NR	Beacon Hill	Lifespace Communities	Lombard	IL	484	374	0	110	77.3%	0.0%	22.7%
158	NR	Wesleyan Village		Elyria	OH	482	194	131	157	40.2%	27.2%	32.6%
159	NR	Lenbrook		Atlanta	GA	481	403	18	60	83.8%	3.7%	12.5%
160	NR	Friendship Village		Waterloo	IA	481	359	50	72	74.6%	10.4%	15.0%
161	NR	Bishop Gadsden Episcopal Retirement Community		Charleston	SC	479	268	111	100	55.9%	23.2%	20.9%
162	NR	Covenant Living of Northbrook	Covenant Living Communities & Services	Northbrook	505	477	338	57	82	70.9%	11.9%	17.2%
163	NR	Falcons Landing		Sterlind	VA	477	328	89	60	68.8%	18.7%	12.6%
164	NR	Edgemere	Lifespace Communities	Dallas	TX	477	304	101	72	63.7%	21.2%	15.1%
165	NR	Cedar Lake Campus	Cedar Community	West Bend	WI	477	85	227	165	17.8%	47.6%	34.6%
166	NR	Normandy Farms Estates	Acts Retirement-Life Communities	Blue Bell	PA	476	349	58	69	73.3%	12.2%	14.5%
167	NR	eliseo	Futura Aging	Tacoma	WA	476	235	54	187	49.4%	11.3%	39.3%
168	NR	Cornwall Manor		Cornwall	PA	475	343	36	96	72.2%	7.6%	20.2%
169	NR	Phoebe Berks	Phoebe Ministries	Wernersville	PA	475	270	103	102	56.8%	21.7%	21.5%
170	NR	The Forum at Rancho San Antonio		Cupertino	CA	474	342	84	48	72.2%	17.7%	10.1%
171	NR	Montereau, Inc.		Tulsa	OK	474	327	73	74	69.0%	15.4%	15.6%
172	NR	Williamsburg Landing, Inc.		Williamsburg	VA	474	318	98	58	67.1%	20.7%	12.2%
173	49	Compass Park		Franklin	IN	473	171	135	167	36.2%	28.5%	35.3%
174	NR	Mennonite Village		Albany	OR	472	304	126	42	64.4%	26.7%	8.9%
175	NR	Virginia Mennonite Retirement Community		Harrisonburg	VA	472	266	86	120	56.4%	18.2%	25.4%

NR: Not Ranked in that year

## Additional Listings: Largest Individual Campuses (continued)

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

2023 Rank	2022 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/22)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
176	NR	Christian Health Care Center	Christian Health	Wyckoff	NJ	472	79	95	298	16.7%	20.1%	63.1%
177	NR	Meadowood Corporation		Worcester	PA	471	339	73	59	72.0%	15.5%	12.5%
178	NR	Saint Therese of New Hope	Saint Therese	New Home	MN	470	212	0	258	45.1%	0.0%	54.9%
179	NR	Fredericka Manor	Front Porch	Chula Vista	CA	469	280	19	170	59.7%	4.1%	36.2%
180	NR	Horizon House		Seattle	WA	468	378	90	0	80.8%	19.2%	0.0%
181	NR	Grandview Terrace Retirement Community	Sun Health Services	Sun City West	AZ	467	288	32	147	61.7%	6.9%	31.5%
182	NR	Indiana Masonic Home at Compass Park		Franklin	IN	466	203	96	167	43.6%	20.6%	35.8%
183	NR	Epworth Villa		Oklahoma City	OK	464	263	114	87	56.7%	24.6%	18.8%
184	NR	Goodwin Living Alexandria	Goodwin Living fka Goodwin House Incorporated	Alexandria	VA	464	255	141	68	55.0%	30.4%	14.7%
185	NR	Masonic Village at Sewickley	Masonic Villages of the Grand Lodge of Pennsylvania	Sewickley	PA	463	272	63	128	58.7%	13.6%	27.6%
186	NR	Masonic Village At Burlington		Burlington	NJ	463	233	87	143	50.3%	18.8%	30.9%
187	NR	Presbyterian SeniorCare Oakmont	Presbyterian SeniorCare Network	Oakmont	PA	461	351	50	60	76.1%	10.8%	13.0%
188	NR	Baptist Village of Owasso	Baptist Village Communities	Owasso	OK	461	269	72	120	58.4%	15.6%	26.0%
189	NR	O'Connor Woods		Stockton	CA	461	245	116	100	53.1%	25.2%	21.7%
190	NR	Homestead Village, Inc.		Lancaster	PA	460	374	26	60	81.3%	5.7%	13.0%
191	NR	Goodwin Living Bailey's Crossroads	Goodwin Living fka Goodwin House Incorporated	Falls Church	VA	460	333	58	69	72.4%	12.6%	15.0%
192	NR	Sunnyside	Sunnyside Communities	Harrisonburg	VA	460	280	96	84	60.9%	20.9%	18.3%
193	NR	White Horse Village		Newtown Square	PA	458	331	68	59	72.3%	14.8%	12.9%
194	NR	St. Mark Village		Palm harbor	FL	458	253	128	77	55.2%	27.9%	16.8%
195	NR	Skaalen Retirement Services		Stoughton	WI	458	187	80	191	40.8%	17.5%	41.7%
196	NR	Bethesda Dilworth	Bethesda Health Group	St. Louis	MO	458	28	0	430	6.1%	0.0%	93.9%
197	NR	The Wesley Community		Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
198	NR	Mercy Ridge, Inc.		Timonium	MD	455	408	47	0	89.7%	10.3%	0.0%
199	NR	Longwood at Oakmont	Presbyterian SeniorCare Network	Verona	PA	455	345	50	60	75.8%	11.0%	13.2%
200	NR	Azalea Trace	Acts Retirement-Life Communities	Pensacola	FL	453	355	50	48	78.4%	11.0%	10.6%

NR: Not Ranked in that year

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# Closing Thoughts



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

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