

2013

LeadingAge 100 Ziegler



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

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

**LeadingAge™**

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The logo for LeadingAge, featuring a stylized heart shape above the word "LeadingAge" in a serif font, with a trademark symbol.

The logo for Ziegler, featuring a stylized wave or ribbon graphic to the left of the word "Ziegler" in a serif font.
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Raising the Bar

As not-for-profit aging services providers, LeadingAge members take responsibility for raising the bar in our field. Ours is a public promise to expand the world of possibilities for aging to the best of our ability—and an internal pledge to strive always to fulfill that commitment through innovation and excellence. LeadingAge offers programs and resources, such as this report, that are based on the latest aging services field-related research and knowledge—including valuable tools, information, education and support to help members honor their commitment.

Produced by:



To expand the world of possibilities for aging, LeadingAge members and affiliates touch the lives of 4 million

individuals, families, employees and volunteers every day. The LeadingAge community includes 6,000 not-for-profit organizations in the United States, 39 state partners, hundreds of businesses, research partners, consumer organizations and foundations, and a broad global network of aging services organizations that reaches over 30 countries. The work of LeadingAge is focused on advocacy, education and applied research. LeadingAge promotes adult day services, home health, hospice, community-based services, PACE, senior housing, assisted living residences, continuing care communities and nursing homes as well as technology solutions and person-centered practices that support the overall health and wellbeing of seniors, children and those with special needs.

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LeadingAge Ziegler 100. The nation's 100 largest not-for-profit multi-site senior living organizations.

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The 2013 LeadingAge Ziegler 100 confirms, once again, the significant role that LeadingAge member not-for-profit organizations play in the aging services field. This report, like the nine editions preceding it, presents a snapshot of the longstanding story of our members' enlightened leadership, transformation and good works. By telling their stories, these organizations are engaged in shared learning – sharing their experiences and strategies with the entire field. At the same time, they are helping to increase public understanding of our sector of long-term services and supports.

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

In 2013, LeadingAge members are addressing complex challenges creatively. Their governing boards and senior leaders are engaging in effective strategic planning to reposition, grow, change, partner, innovate and venture into new service possibilities responsibly.

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

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

A handwritten signature in black ink, reading "Larry Minnix". The signature is written in a cursive, flowing style.

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

LeadingAge



The tenth edition of the LeadingAge Ziegler 100 reflects market trends of 2012. Similar to other recent years, 2012 did not fall short in providing its challenges to providers. The nation is in the early stages of health care reform, our housing market remains fragile, and the economy continues with its inconsistencies. As a result of these challenges, providers are looking to new and innovative ways to attract residents. Organizations are extending marketing and research efforts among all folds of their campuses in order to attract and retain residents at their communities. Management's decisions, as they are faced with challenging times, contribute to various trends that can be noted in the LZ 100 publication from year to year.

As we continue to work with LeadingAge on this publication, we strive to expand upon new areas of research—particularly related to Corporate Structure, Revenues and Technology—that perpetuate Ziegler's desire to bring fresh perspectives to the analysis of the not-for-profit senior living sector. Once again it is through our research in producing the LZ 100 listing that we can study the characteristics of the nation's largest not-for-profit providers. What are the characteristics of their growth and change? What can we glean from these profiles that

may offer other not-for-profit providers a model for their own successful growth?

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

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

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

Ziegler

LeadingAge 100 Ziegler

The LeadingAge Ziegler 100 Objective

Both LeadingAge and Ziegler are nationally recognized organizations serving the growing aging services field. The LeadingAge Ziegler 100 (“LZ 100”) began through the desire of these two organizations to examine and understand the not-for-profit senior living sector. Our goal is to present current data that illustrate the size of the not-for-profit segment of the senior living sector, creating an awareness of the characteristics of growing systems and overall trends of system growth. With the help of the LZ 100, we hope to further the understanding and delivery of successful senior living. The LZ 100 formulates more than just lists. It also provides a means for analysis of detail behind the listings. This year’s tenth edition of the LZ 100 provides a greatly enhanced set of data analyses.

The 2013 LeadingAge Ziegler 100 lists the largest not-for-profit systems providing aging services through senior living in the United States, by order of their total owned market-rate units, as of **December 31, 2012**.

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Chapter 1

Understanding the LeadingAge Ziegler 100

Importance of Not-for-Profits

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

Not-for-profits offer a focused, supportive environment in senior care. Studies bear this out. *Standing the Test of Time: Aging Services – The Not-for-profit Difference* (LeadingAge, 2012) cites a literature review of many credible resources whose research findings affirm the leadership that not-for-profits provide in quality housing, care and services. In 40 studies, all statistically significant comparisons favored not-for-profit providers. Because of their vision and commitment, not-for-profit organizations have stood the test of time and are in a powerful position to effect change. They have created a new standard for care, dramatically shifting the way America cares for seniors.

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

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

The LZ 100 Development

The LZ 100 has been produced by two expert organizations in senior care: LeadingAge, the nation's largest association of not-for-profit aging services providers in the country, and Ziegler, the nation's #1 ranked underwriter of tax-exempt and not-for-profit financings in the United States for senior living¹. Joining together to prepare and present the data, LeadingAge and Ziegler founded the LeadingAge Ziegler 100. The combined expertise of LeadingAge and Ziegler yields a reliable, useful and valuable source of information.

LeadingAge

To expand the world of possibilities for aging, LeadingAge members and affiliates touch the lives of 4 million individuals, families, employees and volunteers every day. The LeadingAge community (www.LeadngAge.org) includes 6,000 not-for-profit organizations in the United States, 39 state partners, hundreds of businesses, research partners, consumer organizations and foundations, and a broad global network of aging services organizations that reaches over 30 countries. The work of LeadingAge is focused on advocacy, education and applied research. LeadingAge promotes adult day services, home health, hospice, community-based services, PACE, senior housing, assisted living residences, continuing care communities and nursing homes as well as technology solutions and person-centered practices that support the overall health and wellbeing of seniors, children and those with special needs.

Ziegler

Ziegler (www.ziegler.com) is one of the nation's leading underwriters of financing for not-for-profit senior living providers¹. 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 as well as senior living research, education, and communication.

Ziegler delivers innovative and comprehensive financial services through: investment banking; financial risk management; investment management; affiliation, merger and acquisition expertise; seed capital; capital and strategic planning services; and FHA-mortgage banking. Ziegler's annual education series offers networking and educational opportunities for senior living providers, capital markets' participants and industry professionals serving the senior living sector.

¹ 2012 ranking data and amounts provided by Thomson Reuters as of 1/2/13.

The LeadingAge Ziegler 100 (LZ 100)

The genesis of the LZ 100 research was to quench a thirst for answers related to the growth of not-for-profit systems. Ziegler had compiled extensive, but primarily anecdotal, information about not-for-profit senior living, gleaned through its experience in working with specific organizations. While useful, this information did not represent the not-for-profit senior living sector as a whole. Ziegler had a host of questions it wished to answer for itself, for its clients and for those interested in investing in the senior living sector:

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

By assembling and presenting the combined data and knowledge of LeadingAge and Ziegler, the LZ 100 publication answers many of these questions. From its inception, the creation of the LZ 100 was an innovative move for those involved with not-for-profit senior living. To our knowledge, listing the largest not-for-profit senior living systems by the number of units they own and operate, representing the number of residents they serve, rather than by their financial success, created a new way of ordering systems, providing a fresh perspective on what was previously understood as a known market. The journey in creating and updating the LZ 100 annually has provided a wealth of data by which to understand and analyze the characteristics of senior living system providers' growth and change.

The organizations in the LZ 100 have made strategic decisions over the years, sometimes to grow and expand to serve a broader community, sometimes to dispose of communities and reposition a portfolio of properties and markets served. The LZ 100 is only the beginning of a profile of providers who are delivering services to the elderly community, both residential and home-based. Thousands of not-for-profit providers are playing an important role in the United States. We embrace each organization's contribution to the populations it serves. Not-for-profits are strong in numbers and bound by shared values, no matter the size of the organization.

Each year we have received positive feedback from both the LZ 100 organizations listed in the inaugural and subsequent publications, and those who desired to be incorporated in the listing. Our initial objective of listing the largest not-for-profit senior living systems has not changed; however, each year through the help of the organizations we are researching, we have updated and cleansed their growth/change data. This 2013 publication of the LZ 100 is not simply a re-publication, but an enhanced and updated publication with new findings.

Chapter 2

The Largest 100

A Quantitative Listing

LeadingAge and Ziegler are not the first to develop a listing of organizations or companies. Many common listings include qualitative factors, such as “best” or “worst” or “most successful.” U.S. News & World Report’s annual rankings of “Best Hospitals” and “Best Nursing Homes” and Fortune magazine’s “World’s Most Admired Companies” are examples of these sorts of listings. Other listings are based on quantitative, objective measures alone. Fortune also produces the “Fortune 500” (derived from public information), a listing of publicly traded companies ranked by annual revenues. Modern Healthcare, a publication focused on the acute care sector, annually ranks health care systems, listing them by net revenue.

Following the footsteps of these influential publications, the LZ 100 also uses a quantitative means of listing. The LZ 100 lists not-for-profit multi-site organizations based on the total number of senior living units (excluding government-subsidized [affordable] units) that each system owns and operates. The **Primary Ranking** is ranked by size—based on total units—carrying no qualitative value judgment in the ranking. Size does not connote quality, nor does it connote financial strength. Both LeadingAge and Ziegler want users of the data to see the LZ 100 as a statement of fact, not as an endorsement.

Methodology

Defining a Multi-site Organization

For the purposes of the LZ 100 listing and analyses, a multi-site organization, or system, has been defined **as a LeadingAge-member not-for-profit organization that owns and operates senior living on more than one campus**. While it is understood that systems may also manage units they do not own, these managed, non-owned units are subject to frequent change and so are not included in the total unit count compiled in the LZ 100 **Primary Ranking**. However, as before, we offer an examination of the extent to which the LZ 100 organizations manage units they do not own. (Chapter 4, Charts 4-16a-c)

It is also understood that some organizations may consider themselves a system if they own, for example, a nursing home on one side of the street with independent living units on the other. We have excluded these organizations from the listing. However, as before, we offer an examination of the extent to which the LZ 100 organizations manage units they do not own. (Chapter 4, Charts 4-16a-c)

It is also understood that some organizations may consider themselves a system if they own, for example, a nursing home on one side of the street with independent living units on the other. We have excluded these organizations from the listing. However, an organization may have multiple community types in close proximity and may market these communities independently of one another. While these types of organizations—with properties contiguous or in close proximity—were not considered systems in the first LZ 100 publication (2004), upon reconsideration we began to include them in subsequent publications (e.g. Willow Valley Retirement Communities [PA]).

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

Compiling the Listing

The LeadingAge Directory of Members was a critical source in compiling the first LZ 100 ranking in the 2004 publication. Using the list of multi-community sponsors in the directory, Ziegler compiled a listing of providers and ordered the organizations on the list by each organization's number of total senior living units (excluding government-subsidized (affordable) housing units, which are, as mentioned earlier, ranked in a list of their own later in this publication). Considerable discussion also occurred with regard to systems in financial distress. Other listings were consulted for guidance in this area, resulting in exclusion of any organization that has publicly declared bankruptcy.

For each organization, Ziegler attempted to trace the history of growth in the organization, starting with the date of inception. The pattern of growth for each system is created by recording the year in which change occurred—by expanding existing communities, building new communities, acquiring existing communities or disposing of communities or units. Web sites, official statements from bond offerings, ratings reports and marketing materials were consulted to determine these changes in the first publication. The LeadingAge membership database is a resource for compilation of the listing, as are other public resources, but subsequent publications have verified data through written confirmations by staff members of the organizations themselves.

Data used for ranking the 2013 LZ 100 were provided and confirmed (“confirmation”) by 95 of the 100 organizations. Forty-seven (47) confirmations were received from the “next 50,” the organizations ranked from 101 to 150. Thirty-one (31) confirmations were received from the next “next 50,” the organizations ranked from 151 to 200. All organizations marked with an asterisk in Charts 3-1a-f did not submit an LZ 100 response. A total of 218 not-for-profit systems were studied for inclusion in the 2013 LZ 100 ranking of not-for-profit, multi-site senior living organizations. In all, roughly 500 organizations have been examined for preparation of the listings in this publication.

Although the information used for the compilation of the LZ 100 was provided in nearly every case by the organizations themselves, some organizations cannot trace their histories to the degree of accuracy desired for the LZ 100 analyses. For instance, the Pace of Growth chart for Christian Homes (LZ 100 #16) (Chart 5-4c) shows the change in total units from year to year, with a snapshot of the unit mix as of 12/31/03. Changes in each unit type are shown from 2003 onward, when data tracking began for the LZ 100 publication. In this and other such cases, historical information has been extrapolated and the current information validated. For some analyses (e.g., the same-store unit and community build-back from 2012 to 2000) where detail was unavailable, unit mix in prior years with uncertain histories was approximated based on the most recent current mix data. The LZ 100’s listing can be tabulated by any one of the variables tracked for the systems. Again, in no way should readers construe the ranking in any of the categories as a measure of quality or value.

Key Findings

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

- **An understanding of size ...** The systems range from 18,462 units to 793 units (compared to 18,934 to 782 units last year).
- **Information on unit mix ...** The 10 largest providers of senior living represent approximately 36 percent of the total number of units for all systems in LZ 100.
- **An appreciation of the rate of growth ...** In the last ten years the average annual growth rate in total units is nearly 2 percent, with a 1.6% increase in 2012 alone.
- **Insights into type of growth ...** The LZ 100 have grown primarily through expansion or by the addition of units through merger, acquisition or affiliation. Nearly 90 percent of the LZ 100 organizations now offer designated memory-support units and 190 small house communities are sponsored by the LZ 100. Six out of 10 (61%) LZ 100 organizations also offer some type of home and community-based services.
- **A glimpse of the geography ...** The systems provide market-rate senior living in 44 states and subsidized housing in four additional states, as well as DC, Puerto Rico, and the U.S. Virgin Islands. The state in the LZ 100 with the highest number of system headquarters is Pennsylvania. Minnesota has the largest total number of communities.
- **A commitment to serve ...** In addition to the approximately 201,000 units represented in LZ 100, 53 percent of the systems offer affordable housing.

LeadingAge 100 Ziegler

Chapter 3

Rankings

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

As in other presentations of this sort, data can be 'cut and sliced' across a variety of time periods: one year, five years, ten years or more. The growth of some LZ 100 organizations may be most dramatic across a five-year period; others may have more change across a ten-year period. Nearly every listing of this sort focuses first, however, on change on an annual basis. Therefore, the **Primary Ranking** (Chart 3-1a) of the LZ 100 is by total senior living units with the 2013 and 2012 rank shown. (Chart 3-1a) of the LZ 100 is by total senior living units with the 2013 and 2012 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 2013 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations, i.e. by Total Senior Living Units (Chart 3-1a).

The 2013 Rank. The 2013 Rank column displays the numerical ranking of each system according to its 12/31/12 data within the LZ 100 for each of the four listings: by Total Senior Living Units, i.e. the **Primary Ranking** (Chart 3-1a), by Total Independent Living Units (Chart 3-1b), by Total Assisted Living Units (Chart 3-1c) and by Total Nursing Care Beds (Chart 3-1d). An organization's ranking in each respective listing may change depending on the composition of its unit mix, that is, the mix of independent living units to assisted living units to nursing units within its system of communities.

The 2012 Rank. The 2012 Rank shows the numerical ranking of the listed organization on last year's publication (according to its 12/31/11 data) listing of the same type. The organizations that show "NR" (Not Ranked) in their ranking were not included in the LZ 100 rankings for 2012.

System Name. The **Primary Ranking** uses the current system name as of the time of publication. No organizations from the LZ 100 reported name changes during 2012, but nine organizations from the “Next 50” and “Next, Next 50” underwent a system name change. See Chapter 4 and Chart 4-7 for additional information on these specific organizations.

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

Units (as of 12/31/12). The systems listed in the 2013 LZ 100 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/12. Managed communities that are not owned will be discussed later in the publication (Chapter 4, Charts 4-16a-c) and are not included in the total community count compiled in the LZ 100 **Primary Ranking**. Government-subsidized (affordable housing) units are also excluded from this count, but are presented for each of the LZ 100 organizations in subsequent listings (Charts 4-15a, 6-3).

Total. The Total column is the sum of the units listed in each of the three different levels of care (described in more detail below). This total is the variable by which the LZ 100 is ranked for the **Primary Ranking** (Chart 3-1a).

Independent living units (ILU). Independent living units may be composed of apartments, duplexes, triplexes, quadplexes or single-family homes. Typically, residents in independent living units pay a combination of a monthly fee and one-time entrance fee to live in the unit. (Note: some residents own these units, but this type of equity model represents a very small number of the independent living units within the LZ 100.) Those who pay a monthly fee will usually receive services such as housekeeping, maintenance, dining, security, lawn maintenance and other services.

Assisted living units (ALU). Assisted living bridges the gap between independent living and nursing home care. Trained employees provide supportive care to residents who are unable to live independently and require assistance with activities of daily living (ADLs), including management of medications, bathing, dressing, toileting, ambulating and eating. Personal Care or Residential Care Units (PCU/RCU) are included in the overall ALU total for LZ 100 organizations. These units share similarities with ALUs but are not licensed as such.

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

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

Many of the not-for-profit organizations have combined independent living, nursing and/or assisted living on one campus. These campuses are typically called continuing care retirement communities, or CCRCs (described in more detail below). Most of the organizations in the LZ 100 have CCRCs within their portfolios; however, for purposes of unit rankings, the units within CCRCs are counted by level of care. Many of the LZ 100 also provide government-subsidized (affordable) housing. Presentations of the data related to these organizations are provided in Charts 4-15a-c and in a dedicated listing for the LeadingAge Ziegler 100 Government-subsidized (Affordable) Housing Listing (Chapter 6).

Communities (as of 12/31/12). Over the years a number of terms have been used to describe a senior living property: site, location, facility, campus, community. A high rise on a limited acreage parcel doesn't fit the term "campus". A scattering of buildings, offering various levels of care, across extended acreage doesn't fit the term "facility". We believe the best all-encompassing word to use is "community". The communities examined are continuing care retirement communities (CCRC), independent living communities (IL), assisted living communities (AL), and nursing homes (NH). It is important to note that a single CCRC may include ILU (independent living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will generally contain at least independent living and nursing care². The CCRC's resident payment plans may include entrance fee, condo/co-op and/or rental programs. Generally the majority of the CCRC's units are not NCB. The systems listed in the LZ 100 are ranked by totaling the communities owned by the system in these four key areas: CCRCs, IL, AL and NH.

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

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

² The definition of CCRC used by Ziegler in its 2009 *Ziegler National CCRC Listing & Profile* includes the qualifying factor that, at a minimum, a community must offer both independent living and nursing services. This may not be consistent with how organizations classify their communities for this LZ 100 research.

Change at a Glance

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

New to the LZ 100 in 2013 are four organizations: Friendship Senior Options (IL), LZ 100 #56, Los Angeles Jewish Home for the Aged (CA), LZ 100 #65, Westminster Ingleside Retirement Communities (DC), LZ 100 #89, and Givens Estates (NC), LZ 100 #97. Additionally, Magnolia Manor (GA), LZ 100 # 42, returns to the list after a two-year absence. Details behind the addition of these organizations are provided with Chart 3-2a.

The organization with the greatest number of units added was The Eddy (NY), LZ 100 #32, an increase from a rank of #54 in 2012. This also makes The Eddy the organization with the greatest upward rank movement. The Eddy increased by a total of 443 units over 2012, through the expansion of its independent living residences and acquisition of three nursing homes.

The emergence of Givens Estates (NC) as a system and appearance in the LZ 100 reflects its expansion from a single-site CCRC to a multi-site organization with the acquisition of Highland Farms. Givens Estates arrives onto the LZ 100 list at #97 with 820 total units.

See further highlights of growth and change occurring in this organization and others in Chart 3-2a-c.

In general, due to the size distribution of the listing, the lower on the listing a system is, the closer it is in number of units to the organizations above and below. Therefore, a relatively small change in number of units can make a large difference in rank. Similarly, those organizations highest in the ranking are separated from one another by hundreds, even thousands, of units and need a greater change in units to effect a change in rank.

3-1 2013 LeadingAge Ziegler 100

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

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|---|-------|---------------------------|--------|-------|--------|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 1 | 1 | Evangelical Lutheran Good Samaritan Society | SD | 18,462 | 4,984 | 2,170 | 11,308 | 180 | 78 | 9 | 36 | 57 |
| 2 | 2 | National Senior Campuses | MD | 17,324 | 15,280 | 917 | 1,127 | 15 | 15 | 0 | 0 | 0 |
| 3 | 3 | ACTS Retirement-Life Communities, Inc. | PA | 8,069 | 5,759 | 877 | 1,433 | 23 | 23 | 0 | 0 | 0 |
| 4 | 4 | Presbyterian Homes and Services | MN | 6,582 | 3,294 | 1,940 | 1,348 | 39 | 13 | 21 | 3 | 2 |
| 5 | 5 | Covenant Retirement Communities | IL | 4,612 | 3,087 | 720 | 805 | 14 | 12 | 1 | 1 | 0 |
| 6 | 6 | Retirement Housing Foundation | CA | 4,112 | 2,639 | 878 | 595 | 18 | 9 | 8 | 1 | 0 |
| 7 | 7 | Lifespace Communities, Inc. | IA | 4,085 | 3,104 | 154 | 827 | 12 | 12 | 0 | 0 | 0 |
| 8 | 10 | The Kendal Corporation | PA | 3,389 | 2,508 | 433 | 448 | 15 | 13 | 2 | 0 | 0 |
| 9 | 8 | Westminster Communities of Florida | FL | 3,299 | 2,088 | 460 | 751 | 10 | 8 | 2 | 0 | 0 |
| 10 | 9 | Lutheran Senior Services | MO | 3,277 | 1,661 | 709 | 907 | 11 | 9 | 0 | 1 | 1 |
| 11 | 11 | Presbyterian Senior Living | PA | 3,176 | 1,425 | 499 | 1,252 | 20 | 12 | 5 | 2 | 1 |
| 12 | 14 | Ohio Presbyterian Retirement Services | OH | 3,034 | 1,723 | 515 | 796 | 11 | 9 | 2 | 0 | 0 |
| 13 | 12 | Cornerstone Affiliates | CA | 2,970 | 1,766 | 484 | 720 | 11 | 11 | 0 | 0 | 0 |
| 14 | 13 | Pacific Retirement Services, Inc. | OR | 2,824 | 2,092 | 344 | 388 | 9 | 8 | 1 | 0 | 0 |
| 15 | 15 | Asbury Communities | MD | 2,775 | 1,943 | 334 | 498 | 5 | 5 | 0 | 0 | 0 |
| 16 | 16 | Christian Homes, Inc. | IL | 2,706 | 676 | 280 | 1,750 | 14 | 13 | 0 | 0 | 1 |
| 17 | 18 | Front Porch | CA | 2,551 | 1,571 | 441 | 539 | 10 | 8 | 2 | 0 | 0 |
| 18 | 17 | Ecumen | MN | 2,545 | 288 | 1,451 | 806 | 40 | 0 | 4 | 27 | 9 |
| 19 | 21 | Volunteers of America | VA | 2,532 | 482 | 707 | 1,343 | 25 | 5 | 2 | 8 | 10 |
| 20 | 20 | Presbyterian Manors of Mid-America | KS | 2,499 | 888 | 555 | 1,056 | 18 | 16 | 0 | 1 | 1 |
| 21 | 19 | Diakon Lutheran Social Ministries | PA | 2,449 | 901 | 576 | 972 | 11 | 8 | 0 | 3 | 0 |
| 22 | 23 | Masonic Villages | PA | 2,325 | 1,397 | 259 | 669 | 5 | 3 | 1 | 1 | 0 |
| 23 | 27 | Shell Point | FL | 2,042 | 1,337 | 377 | 328 | 2 | 2 | 0 | 0 | 0 |
| 24 | 24 | Willow Valley Retirement Communities | PA | 1,997 | 1,501 | 219 | 277 | 3 | 3 | 0 | 0 | 0 |
| 25 | 25 | Providence Life Services | IL | 1,979 | 808 | 472 | 699 | 11 | 1 | 5 | 1 | 4 |

3-1 2013 LeadingAge Ziegler 100

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

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|---|-------|---------------------------|-------|-------|-------|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 26 | 22 | Franciscan Communities | IL | 1,912 | 751 | 385 | 776 | 8 | 4 | 1 | 3 | 0 |
| 27 | 26 | Augustana Care Corporation | MN | 1,896 | 80 | 1,035 | 781 | 18 | 0 | 6 | 6 | 6 |
| 28 | 30 | Otterbein Senior Lifestyle Choices | OH | 1,797 | 744 | 350 | 703 | 10 | 5 | 0 | 0 | 5 |
| 29 | 28 | Christian Care Companies | AZ | 1,786 | 1,434 | 284 | 68 | 4 | 1 | 3 | 0 | 0 |
| 30 | 46 | Concordia Lutheran Ministries | PA | 1,745 | 554 | 901 | 290 | 10 | 3 | 0 | 7 | 0 |
| 31 | 38 | National Church Residences | OH | 1,691 | 705 | 446 | 540 | 7 | 4 | 0 | 2 | 1 |
| 32 | 54 | The Eddy | NY | 1,673 | 502 | 313 | 858 | 11 | 5 | 0 | 1 | 5 |
| 33 | 29 | Elim Care | MN | 1,638 | 190 | 441 | 1,007 | 19 | 1 | 2 | 7 | 9 |
| 34 | 35 | Homewood Retirement Centers | MD | 1,631 | 907 | 273 | 451 | 6 | 6 | 0 | 0 | 0 |
| 35 | 31 | Springpoint Senior Living | NJ | 1,601 | 1,180 | 164 | 257 | 5 | 5 | 0 | 0 | 0 |
| 36 | 33 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 1,601 | 259 | 628 | 714 | 8 | 1 | 2 | 4 | 1 |
| 37 | 34 | Hebrew SeniorLife | MA | 1,593 | 660 | 119 | 814 | 4 | 2 | 1 | 0 | 1 |
| 38 | 36 | Senior Quality Lifestyles Corporation | TX | 1,587 | 989 | 337 | 261 | 5 | 5 | 0 | 0 | 0 |
| 39 | 37 | Eskaton | CA | 1,564 | 530 | 608 | 426 | 13 | 1 | 3 | 6 | 3 |
| 40 | 39 | Bethesda Health Group, Inc.* | MO | 1,522 | 627 | 34 | 861 | 8 | 2 | 4 | 0 | 2 |
| 41 | 40 | Episcopal Senior Communities | CA | 1,505 | 1,024 | 105 | 376 | 7 | 6 | 0 | 0 | 1 |
| 42 | **NR | Magnolia Manor, Inc.* | GA | 1,483 | 339 | 335 | 809 | 8 | 2 | 4 | 1 | 1 |
| 43 | 32 | be.group | CA | 1,473 | 851 | 390 | 232 | 9 | 6 | 0 | 3 | 0 |
| 44 | 42 | Buckner Retirement Services, Inc. | TX | 1,471 | 870 | 315 | 286 | 7 | 5 | 2 | 0 | 0 |
| 45 | 44 | Greencroft | IN | 1,451 | 530 | 388 | 533 | 6 | 6 | 0 | 0 | 0 |
| 46 | 43 | Presbyterian Homes | IL | 1,446 | 859 | 224 | 363 | 4 | 4 | 0 | 0 | 0 |
| 47 | 41 | Holland Home | MI | 1,419 | 723 | 435 | 261 | 4 | 2 | 0 | 1 | 1 |
| 48 | 45 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 1,410 | 60 | 135 | 1,215 | 6 | 2 | 0 | 0 | 4 |
| 49 | 47 | Mississippi Methodist Senior Services | MS | 1,390 | 805 | 265 | 320 | 11 | 2 | 7 | 0 | 2 |
| 50 | 48 | WesleyLife | IA | 1,330 | 695 | 261 | 374 | 7 | 7 | 0 | 0 | 0 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

3-1 2013 LeadingAge Ziegler 100

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

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|--|-------|---------------------------|-----|-------|-----|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 51 | 53 | Baptist Village Retirement Communities of Oklahoma | OK | 1,276 | 770 | 181 | 325 | 8 | 3 | 5 | 0 | 0 |
| 52 | 51 | Lutheran Services for the Aging | NC | 1,274 | 257 | 285 | 732 | 8 | 1 | 1 | 1 | 5 |
| 53 | 52 | Masonicare | CT | 1,266 | 458 | 272 | 536 | 5 | 1 | 1 | 1 | 2 |
| 54 | 50 | Lutheran Life Communities | IL | 1,256 | 233 | 283 | 740 | 5 | 3 | 0 | 2 | 0 |
| 55 | 55 | Bethesda Senior Living Communities | CO | 1,250 | 204 | 1,046 | 0 | 14 | 0 | 3 | 11 | 0 |
| 56 | **NR | Friendship Senior Options | IL | 1,239 | 806 | 185 | 248 | 2 | 2 | 0 | 0 | 0 |
| 57 | 57 | Phoebe Ministries | PA | 1,218 | 380 | 171 | 667 | 4 | 3 | 0 | 0 | 1 |
| 58 | 56 | Virginia Baptist Homes | VA | 1,211 | 764 | 227 | 220 | 4 | 4 | 0 | 0 | 0 |
| 59 | 58 | Virginia United Methodist Homes, Inc. | VA | 1,209 | 628 | 324 | 257 | 7 | 6 | 0 | 1 | 0 |
| 60 | 59 | American Baptist Homes of the Midwest* | MN | 1,200 | 374 | 209 | 617 | 8 | 4 | 1 | 2 | 1 |
| 61 | 60 | Lutheran SeniorLife | PA | 1,158 | 373 | 327 | 458 | 7 | 2 | 5 | 0 | 0 |
| 62 | 61 | EMA, Inc. | MD | 1,156 | 651 | 228 | 277 | 4 | 3 | 0 | 1 | 0 |
| 63 | 62 | Lutheran Social Services of South Central Pennsylvania | PA | 1,150 | 555 | 251 | 344 | 6 | 6 | 0 | 0 | 0 |
| 64 | 63 | Sears Methodist Retirement System, Inc. | TX | 1,097 | 529 | 136 | 432 | 6 | 5 | 0 | 0 | 1 |
| 65 | **NR | Los Angeles Jewish Home for the Aged* | CA | 1,092 | 159 | 423 | 510 | 3 | 1 | 2 | 0 | 0 |
| 66 | 65 | Northern California Presbyterian Homes and Services | CA | 1,089 | 826 | 122 | 141 | 4 | 3 | 1 | 0 | 0 |
| 67 | 66 | Presbyterian SeniorCare | PA | 1,065 | 359 | 285 | 421 | 3 | 3 | 0 | 0 | 0 |
| 68 | 67 | United Methodist Homes | NY | 1,059 | 395 | 238 | 426 | 4 | 3 | 0 | 1 | 0 |
| 69 | 68 | Presbyterian Villages of Michigan | MI | 1,052 | 588 | 286 | 178 | 8 | 2 | 6 | 0 | 0 |
| 70 | 69 | Lutheran Homes of South Carolina | SC | 1,038 | 386 | 328 | 324 | 5 | 5 | 0 | 0 | 0 |
| 71 | 70 | Walker Methodist | MN | 1,034 | 493 | 165 | 376 | 6 | 1 | 4 | 1 | 0 |
| 72 | 71 | United Methodist Homes of New Jersey | NJ | 1,028 | 88 | 688 | 252 | 5 | 1 | 0 | 4 | 0 |
| 73 | 72 | Wesley Enhanced Living | PA | 1,016 | 502 | 214 | 300 | 6 | 5 | 0 | 1 | 0 |
| 74 | 64 | Air Force Villages | TX | 1,013 | 748 | 129 | 136 | 3 | 2 | 0 | 1 | 0 |
| 75 | 74 | Elant | NY | 995 | 148 | 144 | 703 | 6 | 1 | 0 | 1 | 4 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year



3-1 2013 LeadingAge Ziegler 100

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

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|--|-------|---------------------------|-----|-----|-----|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 76 | 75 | United Church Homes | OH | 977 | 177 | 136 | 664 | 6 | 4 | 0 | 0 | 2 |
| 77 | 49 | SantaFe Senior Living | FL | 976 | 731 | 185 | 60 | 3 | 1 | 2 | 0 | 0 |
| 78 | 78 | The Presbyterian Homes, Inc. of North Carolina | NC | 956 | 634 | 133 | 189 | 3 | 3 | 0 | 0 | 0 |
| 79 | 77 | Presby's Inspired Life | PA | 947 | 469 | 218 | 260 | 4 | 2 | 1 | 0 | 1 |
| 80 | 79 | United Church Homes & Services | NC | 944 | 526 | 90 | 328 | 3 | 3 | 0 | 0 | 0 |
| 81 | 80 | United Methodist Retirement Homes, Inc. | NC | 937 | 630 | 101 | 206 | 3 | 3 | 0 | 0 | 0 |
| 82 | 76 | Menno Haven | PA | 920 | 531 | 177 | 212 | 3 | 2 | 1 | 0 | 0 |
| 83 | 85 | United Methodist Memorial Home | IN | 917 | 189 | 469 | 259 | 4 | 3 | 0 | 1 | 0 |
| 84 | 86 | Mather LifeWays | IL | 900 | 623 | 46 | 231 | 5 | 2 | 2 | 0 | 1 |
| 85 | 73 | VMP | WI | 889 | 447 | 205 | 237 | 2 | 2 | 0 | 0 | 0 |
| 86 | 87 | Oakwood Lutheran Senior Ministries | WI | 885 | 588 | 160 | 137 | 2 | 2 | 0 | 0 | 0 |
| 87 | 88 | Cedar Community | WI | 881 | 431 | 203 | 247 | 5 | 2 | 1 | 1 | 1 |
| 88 | 84 | Christian Care Centers | TX | 879 | 402 | 137 | 340 | 3 | 3 | 0 | 0 | 0 |
| 89 | **NR | Westminster Ingleside Retirement Communities | DC | 878 | 608 | 124 | 146 | 3 | 3 | 0 | 0 | 0 |
| 90 | 89 | Presbyterian Communities and Services | TX | 864 | 334 | 139 | 391 | 2 | 2 | 0 | 0 | 0 |
| 91 | 83 | St. Ann's Community | NY | 863 | 246 | 75 | 542 | 2 | 2 | 0 | 0 | 0 |
| 92 | 90 | Simpson Senior Services | PA | 858 | 494 | 172 | 192 | 3 | 3 | 0 | 0 | 0 |
| 93 | 93 | Living Branches | PA | 852 | 463 | 246 | 143 | 3 | 2 | 0 | 1 | 0 |
| 94 | 91 | Presbyterian Communities of South Carolina | SC | 848 | 292 | 290 | 266 | 5 | 5 | 0 | 0 | 0 |
| 95 | 95 | LutherCare | PA | 840 | 483 | 128 | 229 | 3 | 1 | 1 | 0 | 1 |
| 96 | 92 | Goodwin House Incorporated | VA | 838 | 590 | 99 | 149 | 2 | 2 | 0 | 0 | 0 |
| 97 | **NR | Givens Estates Retirement Community | NC | 820 | 599 | 91 | 130 | 2 | 2 | 0 | 0 | 0 |
| 98 | 96 | Elder Care Alliance | CA | 803 | 39 | 657 | 107 | 6 | 1 | 0 | 5 | 0 |
| 99 | 100 | Western Home Communities | IA | 793 | 463 | 230 | 100 | 3 | 1 | 2 | 0 | 0 |
| 100 | 98 | Morningside Ministries | TX | 793 | 321 | 136 | 336 | 3 | 3 | 0 | 0 | 0 |

** NR: Not Ranked in that year

IN ALL CHAPTER 4 & CHAPTER 5 CHARTS "2012 RANK" REFERS TO THE RANK LISTED UNDER 2012 RANK, ABOVE. When Total Senior Living Units are the same for two organizations they are then ranked by Independent Living Units, so the organization with the greater number of Independent Living Units receives the higher ranking (i.e. lower number).

3-1 2013 LeadingAge Ziegler 100

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|---|-------|---------------------------|--------|-------|--------|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 1 | 1 | National Senior Campuses | MD | 17,324 | 15,280 | 917 | 1,127 | 15 | 15 | 0 | 0 | 0 |
| 2 | 2 | ACTS Retirement-Life Communities, Inc. | PA | 8,069 | 5,759 | 877 | 1,433 | 23 | 23 | 0 | 0 | 0 |
| 3 | 3 | Evangelical Lutheran Good Samaritan Society | SD | 18,462 | 4,984 | 2,170 | 11,308 | 180 | 78 | 9 | 36 | 57 |
| 4 | 4 | Presbyterian Homes and Services | MN | 6,582 | 3,294 | 1,940 | 1,348 | 39 | 13 | 21 | 3 | 2 |
| 5 | 5 | Lifespace Communities, Inc. | IA | 4,085 | 3,104 | 154 | 827 | 12 | 12 | 0 | 0 | 0 |
| 6 | 6 | Covenant Retirement Communities | IL | 4,612 | 3,087 | 720 | 805 | 14 | 12 | 1 | 1 | 0 |
| 7 | 7 | Retirement Housing Foundation | CA | 4,112 | 2,639 | 878 | 595 | 18 | 9 | 8 | 1 | 0 |
| 8 | 8 | The Kendal Corporation | PA | 3,389 | 2,508 | 433 | 448 | 15 | 13 | 2 | 0 | 0 |
| 9 | 9 | Pacific Retirement Services, Inc. | OR | 2,824 | 2,092 | 344 | 388 | 9 | 8 | 1 | 0 | 0 |
| 10 | 10 | Westminster Communities of Florida | FL | 3,299 | 2,088 | 460 | 751 | 10 | 8 | 2 | 0 | 0 |
| 11 | 11 | Asbury Communities | MD | 2,775 | 1,943 | 334 | 498 | 5 | 5 | 0 | 0 | 0 |
| 12 | 12 | Cornerstone Affiliates | CA | 2,970 | 1,766 | 484 | 720 | 11 | 11 | 0 | 0 | 0 |
| 13 | 15 | Ohio Presbyterian Retirement Services | OH | 3,034 | 1,723 | 515 | 796 | 11 | 9 | 2 | 0 | 0 |
| 14 | 13 | Lutheran Senior Services | MO | 3,277 | 1,661 | 709 | 907 | 11 | 9 | 0 | 1 | 1 |
| 15 | 14 | Front Porch | CA | 2,551 | 1,571 | 441 | 539 | 10 | 8 | 2 | 0 | 0 |
| 16 | 16 | Willow Valley Retirement Communities | PA | 1,997 | 1,501 | 219 | 277 | 3 | 3 | 0 | 0 | 0 |
| 17 | 17 | Christian Care Companies | AZ | 1,786 | 1,434 | 284 | 68 | 4 | 1 | 3 | 0 | 0 |
| 18 | 19 | Presbyterian Senior Living | PA | 3,176 | 1,425 | 499 | 1,252 | 20 | 12 | 5 | 2 | 1 |
| 19 | 18 | Masonic Villages | PA | 2,325 | 1,397 | 259 | 669 | 5 | 3 | 1 | 1 | 0 |
| 20 | 20 | Shell Point | FL | 2,042 | 1,337 | 377 | 328 | 2 | 2 | 0 | 0 | 0 |
| 21 | 21 | Springpoint Senior Living | NJ | 1,601 | 1,180 | 164 | 257 | 5 | 5 | 0 | 0 | 0 |
| 22 | 23 | Episcopal Senior Communities | CA | 1,505 | 1,024 | 105 | 376 | 7 | 6 | 0 | 0 | 1 |
| 23 | 24 | Senior Quality Lifestyles Corporation | TX | 1,587 | 989 | 337 | 261 | 5 | 5 | 0 | 0 | 0 |
| 24 | 30 | Homewood Retirement Centers | MD | 1,631 | 907 | 273 | 451 | 6 | 6 | 0 | 0 | 0 |
| 25 | 27 | Diakon Lutheran Social Ministries | PA | 2,449 | 901 | 576 | 972 | 11 | 8 | 0 | 3 | 0 |

3-1 2013 LeadingAge Ziegler 100

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | Communities (as of 12/31/12) | | | | | |
|-----------|-----------|---|-------|---------------------------|-----|-----|---------------------------------|-------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 26 | 28 | Presbyterian Manors of Mid-America | KS | 2,499 | 888 | 555 | 1,056 | 18 | 16 | 0 | 1 | 1 |
| 27 | 29 | Buckner Retirement Services, Inc. | TX | 1,471 | 870 | 315 | 286 | 7 | 5 | 2 | 0 | 0 |
| 28 | 31 | Presbyterian Homes | IL | 1,446 | 859 | 224 | 363 | 4 | 4 | 0 | 0 | 0 |
| 29 | 25 | be.group | CA | 1,473 | 851 | 390 | 232 | 9 | 6 | 0 | 3 | 0 |
| 30 | 32 | Northern California Presbyterian Homes and Services | CA | 1,089 | 826 | 122 | 141 | 4 | 3 | 1 | 0 | 0 |
| 31 | 33 | Providence Life Services | IL | 1,979 | 808 | 472 | 699 | 11 | 1 | 5 | 1 | 4 |
| 32 | ** NR | Friendship Senior Options | IL | 1,239 | 806 | 185 | 248 | 2 | 2 | 0 | 0 | 0 |
| 33 | 34 | Mississippi Methodist Senior Services | MS | 1,390 | 805 | 265 | 320 | 11 | 2 | 7 | 0 | 2 |
| 34 | 36 | Baptist Village Retirement Communities of Oklahoma | OK | 1,276 | 770 | 181 | 325 | 8 | 3 | 5 | 0 | 0 |
| 35 | 35 | Virginia Baptist Homes | VA | 1,211 | 764 | 227 | 220 | 4 | 4 | 0 | 0 | 0 |
| 36 | 22 | Franciscan Communities | IL | 1,912 | 751 | 385 | 776 | 8 | 4 | 1 | 3 | 0 |
| 37 | 37 | Air Force Villages | TX | 1,013 | 748 | 129 | 136 | 3 | 2 | 0 | 1 | 0 |
| 38 | 39 | Otterbein Senior Lifestyle Choices | OH | 1,797 | 744 | 350 | 703 | 10 | 5 | 0 | 0 | 5 |
| 39 | 26 | SantaFe Senior Living | FL | 976 | 731 | 185 | 60 | 3 | 1 | 2 | 0 | 0 |
| 40 | 38 | Holland Home | MI | 1,419 | 723 | 435 | 261 | 4 | 2 | 0 | 1 | 1 |
| 41 | 40 | National Church Residences | OH | 1,691 | 705 | 446 | 540 | 7 | 4 | 0 | 2 | 1 |
| 42 | 41 | WesleyLife | IA | 1,330 | 695 | 261 | 374 | 7 | 7 | 0 | 0 | 0 |
| 43 | 42 | Christian Homes, Inc. | IL | 2,706 | 676 | 280 | 1,750 | 14 | 13 | 0 | 0 | 1 |
| 44 | 43 | Hebrew SeniorLife | MA | 1,593 | 660 | 119 | 814 | 4 | 2 | 1 | 0 | 1 |
| 45 | 44 | EMA, Inc. | MD | 1,156 | 651 | 228 | 277 | 4 | 3 | 0 | 1 | 0 |
| 46 | 45 | The Presbyterian Homes, Inc. of North Carolina | NC | 956 | 634 | 133 | 189 | 3 | 3 | 0 | 0 | 0 |
| 47 | 46 | United Methodist Retirement Homes, Inc. | NC | 937 | 630 | 101 | 206 | 3 | 3 | 0 | 0 | 0 |
| 48 | 48 | Virginia United Methodist Homes, Inc. | VA | 1,209 | 628 | 324 | 257 | 7 | 6 | 0 | 1 | 0 |
| 49 | 47 | Bethesda Health Group, Inc.* | MO | 1,522 | 627 | 34 | 861 | 8 | 2 | 4 | 0 | 2 |
| 50 | 49 | Mather LifeWays | IL | 900 | 623 | 46 | 231 | 5 | 2 | 2 | 0 | 1 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

3-1 2013 LeadingAge Ziegler 100

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|--|-------|---------------------------|-----|-----|-------|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 51 | ** NR | Westminster Ingleside Retirement Communities | DC | 878 | 608 | 124 | 146 | 3 | 3 | 0 | 0 | 0 |
| 52 | ** NR | Givens Estates Retirement Community | NC | 820 | 599 | 91 | 130 | 2 | 2 | 0 | 0 | 0 |
| 53 | 50 | Goodwin House Incorporated | VA | 838 | 590 | 99 | 149 | 2 | 2 | 0 | 0 | 0 |
| 54 | 54 | Presbyterian Villages of Michigan | MI | 1,052 | 588 | 286 | 178 | 8 | 2 | 6 | 0 | 0 |
| 55 | 51 | Oakwood Lutheran Senior Ministries | WI | 885 | 588 | 160 | 137 | 2 | 2 | 0 | 0 | 0 |
| 56 | 55 | Lutheran Social Services of South Central Pennsylvania | PA | 1,150 | 555 | 251 | 344 | 6 | 6 | 0 | 0 | 0 |
| 57 | 70 | Concordia Lutheran Ministries | PA | 1,745 | 554 | 901 | 290 | 10 | 3 | 0 | 7 | 0 |
| 58 | 53 | Menno Haven | PA | 920 | 531 | 177 | 212 | 3 | 2 | 1 | 0 | 0 |
| 59 | 61 | Eskaton | CA | 1,564 | 530 | 608 | 426 | 13 | 1 | 3 | 6 | 3 |
| 60 | 58 | Greencroft | IN | 1,451 | 530 | 388 | 533 | 6 | 6 | 0 | 0 | 0 |
| 61 | 57 | Sears Methodist Retirement System, Inc. | TX | 1,097 | 529 | 136 | 432 | 6 | 5 | 0 | 0 | 1 |
| 62 | 60 | United Church Homes & Services | NC | 944 | 526 | 90 | 328 | 3 | 3 | 0 | 0 | 0 |
| 63 | 63 | The Eddy | NY | 1,673 | 502 | 313 | 858 | 11 | 5 | 0 | 1 | 5 |
| 64 | 62 | Wesley Enhanced Living | PA | 1,016 | 502 | 214 | 300 | 6 | 5 | 0 | 1 | 0 |
| 65 | 64 | Simpson Senior Services | PA | 858 | 494 | 172 | 192 | 3 | 3 | 0 | 0 | 0 |
| 66 | 65 | Walker Methodist | MN | 1,034 | 493 | 165 | 376 | 6 | 1 | 4 | 1 | 0 |
| 67 | 67 | Luthercare | PA | 840 | 483 | 128 | 229 | 3 | 1 | 1 | 0 | 1 |
| 68 | 77 | Volunteers of America | VA | 2,532 | 482 | 707 | 1,343 | 25 | 5 | 2 | 8 | 10 |
| 69 | 66 | Presby's Inspired Life | PA | 947 | 469 | 218 | 260 | 4 | 2 | 1 | 0 | 1 |
| 70 | 68 | Living Branches | PA | 852 | 463 | 246 | 143 | 3 | 2 | 0 | 1 | 0 |
| 71 | 71 | Western Home Communities | IA | 793 | 463 | 230 | 100 | 3 | 1 | 2 | 0 | 0 |
| 72 | 69 | Masonicare | CT | 1,266 | 458 | 272 | 536 | 5 | 1 | 1 | 1 | 2 |
| 73 | 52 | VMP | WI | 889 | 447 | 205 | 237 | 2 | 2 | 0 | 0 | 0 |
| 74 | 72 | Cedar Community | WI | 881 | 431 | 203 | 247 | 5 | 2 | 1 | 1 | 1 |
| 75 | 75 | Christian Care Centers | TX | 879 | 402 | 137 | 340 | 3 | 3 | 0 | 0 | 0 |

** NR: Not Ranked in that year

LeadingAge



Ziegler

3-1 2013 LeadingAge Ziegler 100

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|---|-------|---------------------------|-----|-------|-------|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 76 | 76 | United Methodist Homes | NY | 1,059 | 395 | 238 | 426 | 4 | 3 | 0 | 1 | 0 |
| 77 | 78 | Lutheran Homes of South Carolina | SC | 1,038 | 386 | 328 | 324 | 5 | 5 | 0 | 0 | 0 |
| 78 | 74 | Phoebe Ministries | PA | 1,218 | 380 | 171 | 667 | 4 | 3 | 0 | 0 | 1 |
| 79 | 79 | American Baptist Homes of the Midwest | MN | 1,200 | 374 | 209 | 617 | 8 | 4 | 1 | 2 | 1 |
| 80 | 73 | Lutheran SeniorLife | PA | 1,158 | 373 | 327 | 458 | 7 | 2 | 5 | 0 | 0 |
| 81 | 80 | Presbyterian SeniorCare | PA | 1,065 | 359 | 285 | 421 | 3 | 3 | 0 | 0 | 0 |
| 82 | ** NR | Magnolia Manor, Inc. | GA | 1,483 | 339 | 335 | 809 | 8 | 2 | 4 | 1 | 1 |
| 83 | 81 | Presbyterian Communities and Services | TX | 864 | 334 | 139 | 391 | 2 | 2 | 0 | 0 | 0 |
| 84 | 83 | Morningside Ministries | TX | 793 | 321 | 136 | 336 | 3 | 3 | 0 | 0 | 0 |
| 85 | 85 | Presbyterian Communities of South Carolina | SC | 848 | 292 | 290 | 266 | 5 | 5 | 0 | 0 | 0 |
| 86 | 86 | Ecumen | MN | 2,545 | 288 | 1,451 | 806 | 40 | 0 | 4 | 27 | 9 |
| 87 | 88 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 1,601 | 259 | 628 | 714 | 8 | 1 | 2 | 4 | 1 |
| 88 | 89 | Lutheran Services for the Aging | NC | 1,274 | 257 | 285 | 732 | 8 | 1 | 1 | 1 | 5 |
| 89 | 90 | St. Ann's Community | NY | 863 | 246 | 75 | 542 | 2 | 2 | 0 | 0 | 0 |
| 90 | 91 | Lutheran Life Communities | IL | 1,256 | 233 | 283 | 740 | 5 | 3 | 0 | 2 | 0 |
| 91 | 92 | Bethesda Senior Living Communities | CO | 1,250 | 204 | 1,046 | 0 | 14 | 0 | 3 | 11 | 0 |
| 92 | 87 | Elim Care | MN | 1,638 | 190 | 441 | 1,007 | 19 | 1 | 2 | 7 | 9 |
| 93 | 94 | United Methodist Memorial Home | IN | 917 | 189 | 469 | 259 | 4 | 3 | 0 | 1 | 0 |
| 94 | 95 | United Church Homes | OH | 977 | 177 | 136 | 664 | 6 | 4 | 0 | 0 | 2 |
| 95 | ** NR | Los Angeles Jewish Home for the Aged* | CA | 1,092 | 159 | 423 | 510 | 3 | 1 | 2 | 0 | 0 |
| 96 | 96 | Elant | NY | 995 | 148 | 144 | 703 | 6 | 1 | 0 | 1 | 4 |
| 97 | 98 | United Methodist Homes of New Jersey | NJ | 1,028 | 88 | 688 | 252 | 5 | 1 | 0 | 4 | 0 |
| 98 | 97 | Augustana Care Corporation | MN | 1,896 | 80 | 1,035 | 781 | 18 | 0 | 6 | 6 | 6 |
| 99 | 99 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 1,410 | 60 | 135 | 1,215 | 6 | 2 | 0 | 0 | 4 |
| 100 | 100 | Elder Care Alliance | CA | 803 | 39 | 657 | 107 | 6 | 1 | 0 | 5 | 0 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

3-1 2013 LeadingAge Ziegler 100

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

3-1c RANKED BY ASSISTED LIVING UNITS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|---|-------|---------------------------|--------|-------|--------|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 1 | 1 | Evangelical Lutheran Good Samaritan Society | SD | 18,462 | 4,984 | 2,170 | 11,308 | 180 | 78 | 9 | 36 | 57 |
| 2 | 2 | Presbyterian Homes and Services | MN | 6,582 | 3,294 | 1,940 | 1,348 | 39 | 13 | 21 | 3 | 2 |
| 3 | 3 | Ecumen | MN | 2,545 | 288 | 1,451 | 806 | 40 | 0 | 4 | 27 | 9 |
| 4 | 4 | Bethesda Senior Living Communities | CO | 1,250 | 204 | 1,046 | 0 | 14 | 0 | 3 | 11 | 0 |
| 5 | 6 | Augustana Care Corporation | MN | 1,896 | 80 | 1,035 | 781 | 18 | 0 | 6 | 6 | 6 |
| 6 | 7 | National Senior Campuses | MD | 17,324 | 15,280 | 917 | 1,127 | 15 | 15 | 0 | 0 | 0 |
| 7 | 11 | Concordia Lutheran Ministries | PA | 1,745 | 554 | 901 | 290 | 10 | 3 | 0 | 7 | 0 |
| 8 | 5 | Retirement Housing Foundation | CA | 4,112 | 2,639 | 878 | 595 | 18 | 9 | 8 | 1 | 0 |
| 9 | 8 | ACTS Retirement-Life Communities, Inc. | PA | 8,069 | 5,759 | 877 | 1,433 | 23 | 23 | 0 | 0 | 0 |
| 10 | 9 | Covenant Retirement Communities | IL | 4,612 | 3,087 | 720 | 805 | 14 | 12 | 1 | 1 | 0 |
| 11 | 10 | Lutheran Senior Services | MO | 3,277 | 1,661 | 709 | 907 | 11 | 9 | 0 | 1 | 1 |
| 12 | 17 | Volunteers of America | VA | 2,532 | 482 | 707 | 1,343 | 25 | 5 | 2 | 8 | 10 |
| 13 | 12 | United Methodist Homes of New Jersey | NJ | 1,028 | 88 | 688 | 252 | 5 | 1 | 0 | 4 | 0 |
| 14 | 13 | Elder Care Alliance | CA | 803 | 39 | 657 | 107 | 6 | 1 | 0 | 5 | 0 |
| 15 | 14 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 1,601 | 259 | 628 | 714 | 8 | 1 | 2 | 4 | 1 |
| 16 | 16 | Eskaton | CA | 1,564 | 530 | 608 | 426 | 13 | 1 | 3 | 6 | 3 |
| 17 | 15 | Diakon Lutheran Social Ministries | PA | 2,449 | 901 | 576 | 972 | 11 | 8 | 0 | 3 | 0 |
| 18 | 18 | Presbyterian Manors of Mid-America | KS | 2,499 | 888 | 555 | 1,056 | 18 | 16 | 0 | 1 | 1 |
| 19 | 19 | Ohio Presbyterian Retirement Services | OH | 3,034 | 1,723 | 515 | 796 | 11 | 9 | 2 | 0 | 0 |
| 20 | 21 | Presbyterian Senior Living | PA | 3,176 | 1,425 | 499 | 1,252 | 20 | 12 | 5 | 2 | 1 |
| 21 | 22 | Cornerstone Affiliates | CA | 2,970 | 1,766 | 484 | 720 | 11 | 11 | 0 | 0 | 0 |
| 22 | 24 | Providence Life Services | IL | 1,979 | 808 | 472 | 699 | 11 | 1 | 5 | 1 | 4 |
| 23 | 25 | United Methodist Memorial Home | IN | 917 | 189 | 469 | 259 | 4 | 3 | 0 | 1 | 0 |
| 24 | 26 | Westminster Communities of Florida | FL | 3,299 | 2,088 | 460 | 751 | 10 | 8 | 2 | 0 | 0 |
| 25 | 32 | National Church Residences | OH | 1,691 | 705 | 446 | 540 | 7 | 4 | 0 | 2 | 1 |

3-1 2013 LeadingAge Ziegler 100

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

3-1c RANKED BY ASSISTED LIVING UNITS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|--|-------|---------------------------|-------|-----|-------|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 26 | 27 | Front Porch | CA | 2,551 | 1,571 | 441 | 539 | 10 | 8 | 2 | 0 | 0 |
| 27 | 28 | Elim Care | MN | 1,638 | 190 | 441 | 1,007 | 19 | 1 | 2 | 7 | 9 |
| 28 | 20 | Holland Home | MI | 1,419 | 723 | 435 | 261 | 4 | 2 | 0 | 1 | 1 |
| 29 | 31 | The Kendal Corporation | PA | 3,389 | 2,508 | 433 | 448 | 15 | 13 | 2 | 0 | 0 |
| 30 | ** NR | Los Angeles Jewish Home for the Aged* | CA | 1,092 | 159 | 423 | 510 | 3 | 1 | 2 | 0 | 0 |
| 31 | 29 | be.group | CA | 1,473 | 851 | 390 | 232 | 9 | 6 | 0 | 3 | 0 |
| 32 | 30 | Greencroft | IN | 1,451 | 530 | 388 | 533 | 6 | 6 | 0 | 0 | 0 |
| 33 | 23 | Franciscan Communities | IL | 1,912 | 751 | 385 | 776 | 8 | 4 | 1 | 3 | 0 |
| 34 | 51 | Shell Point | FL | 2,042 | 1,337 | 377 | 328 | 2 | 2 | 0 | 0 | 0 |
| 35 | 37 | Otterbein Senior Lifestyle Choices | OH | 1,797 | 744 | 350 | 703 | 10 | 5 | 0 | 0 | 5 |
| 36 | 41 | Pacific Retirement Services, Inc. | OR | 2,824 | 2,092 | 344 | 388 | 9 | 8 | 1 | 0 | 0 |
| 37 | 33 | Senior Quality Lifestyles Corporation | TX | 1,587 | 989 | 337 | 261 | 5 | 5 | 0 | 0 | 0 |
| 38 | ** NR | Magnolia Manor, Inc.* | GA | 1,483 | 339 | 335 | 809 | 8 | 2 | 4 | 1 | 1 |
| 39 | 34 | Asbury Communities | MD | 2,775 | 1,943 | 334 | 498 | 5 | 5 | 0 | 0 | 0 |
| 40 | 36 | Lutheran Homes of South Carolina | SC | 1,038 | 386 | 328 | 324 | 5 | 5 | 0 | 0 | 0 |
| 41 | 38 | Lutheran SeniorLife | PA | 1,158 | 373 | 327 | 458 | 7 | 2 | 5 | 0 | 0 |
| 42 | 35 | Virginia United Methodist Homes, Inc. | VA | 1,209 | 628 | 324 | 257 | 7 | 6 | 0 | 1 | 0 |
| 43 | 39 | Buckner Retirement Services, Inc. | TX | 1,471 | 870 | 315 | 286 | 7 | 5 | 2 | 0 | 0 |
| 44 | 40 | The Eddy | NY | 1,673 | 502 | 313 | 858 | 11 | 5 | 0 | 1 | 5 |
| 45 | 43 | Presbyterian Communities of South Carolina | SC | 848 | 292 | 290 | 266 | 5 | 5 | 0 | 0 | 0 |
| 46 | 42 | Presbyterian Villages of Michigan | MI | 1,052 | 588 | 286 | 178 | 8 | 2 | 6 | 0 | 0 |
| 47 | 45 | Presbyterian SeniorCare | PA | 1,065 | 359 | 285 | 421 | 3 | 3 | 0 | 0 | 0 |
| 48 | 47 | Lutheran Services for the Aging | NC | 1,274 | 257 | 285 | 732 | 8 | 1 | 1 | 1 | 5 |
| 49 | 44 | Christian Care Companies | AZ | 1,786 | 1,434 | 284 | 68 | 4 | 1 | 3 | 0 | 0 |
| 50 | 46 | Lutheran Life Communities | IL | 1,256 | 233 | 283 | 740 | 5 | 3 | 0 | 2 | 0 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

3-1 2013 LeadingAge Ziegler 100

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

3-1c RANKED BY ASSISTED LIVING UNITS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|--|-------|---------------------------|-------|-----|-------|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 51 | 48 | Christian Homes, Inc. | IL | 2,706 | 676 | 280 | 1,750 | 14 | 13 | 0 | 0 | 1 |
| 52 | 50 | Homewood Retirement Centers | MD | 1,631 | 907 | 273 | 451 | 6 | 6 | 0 | 0 | 0 |
| 53 | 52 | Masonicare | CT | 1,266 | 458 | 272 | 536 | 5 | 1 | 1 | 1 | 2 |
| 54 | 53 | Mississippi Methodist Senior Services | MS | 1,390 | 805 | 265 | 320 | 11 | 2 | 7 | 0 | 2 |
| 55 | 54 | WesleyLife | IA | 1,330 | 695 | 261 | 374 | 7 | 7 | 0 | 0 | 0 |
| 56 | 55 | Masonic Villages | PA | 2,325 | 1,397 | 259 | 669 | 5 | 3 | 1 | 1 | 0 |
| 57 | 57 | Lutheran Social Services of South Central Pennsylvania | PA | 1,150 | 555 | 251 | 344 | 6 | 6 | 0 | 0 | 0 |
| 58 | 58 | Living Branches | PA | 852 | 463 | 246 | 143 | 3 | 2 | 0 | 1 | 0 |
| 59 | 59 | United Methodist Homes* | NY | 1,059 | 395 | 238 | 426 | 4 | 3 | 0 | 1 | 0 |
| 60 | 61 | Western Home Communities | IA | 793 | 463 | 230 | 100 | 3 | 1 | 2 | 0 | 0 |
| 61 | 62 | EMA, Inc. | MD | 1,156 | 651 | 228 | 277 | 4 | 3 | 0 | 1 | 0 |
| 62 | 63 | Virginia Baptist Homes | VA | 1,211 | 764 | 227 | 220 | 4 | 4 | 0 | 0 | 0 |
| 63 | 60 | Presbyterian Homes | IL | 1,446 | 859 | 224 | 363 | 4 | 4 | 0 | 0 | 0 |
| 64 | 56 | Willow Valley Retirement Communities | PA | 1,997 | 1,501 | 219 | 277 | 3 | 3 | 0 | 0 | 0 |
| 65 | 65 | Presby's Inspired Life | PA | 947 | 469 | 218 | 260 | 4 | 2 | 1 | 0 | 1 |
| 66 | 66 | Wesley Enhanced Living | PA | 1,016 | 502 | 214 | 300 | 6 | 5 | 0 | 1 | 0 |
| 67 | 67 | American Baptist Homes of the Midwest* | MN | 1,200 | 374 | 209 | 617 | 8 | 4 | 1 | 2 | 1 |
| 68 | 68 | VMP | WI | 889 | 447 | 205 | 237 | 2 | 2 | 0 | 0 | 0 |
| 69 | 69 | Cedar Community | WI | 881 | 431 | 203 | 247 | 5 | 2 | 1 | 1 | 1 |
| 70 | ** NR | Friendship Senior Options | IL | 1,239 | 806 | 185 | 248 | 2 | 2 | 0 | 0 | 0 |
| 71 | 49 | SantaFe Senior Living | FL | 976 | 731 | 185 | 60 | 3 | 1 | 2 | 0 | 0 |
| 72 | 75 | Baptist Village Retirement Communities of Oklahoma | OK | 1,276 | 770 | 181 | 325 | 8 | 3 | 5 | 0 | 0 |
| 73 | 73 | Menno Haven | PA | 920 | 531 | 177 | 212 | 3 | 2 | 1 | 0 | 0 |
| 74 | 74 | Simpson Senior Services | PA | 858 | 494 | 172 | 192 | 3 | 3 | 0 | 0 | 0 |
| 75 | 81 | Phoebe Ministries | PA | 1,218 | 380 | 171 | 667 | 4 | 3 | 0 | 0 | 1 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

3-1 2013 LeadingAge Ziegler 100

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

3-1c RANKED BY ASSISTED LIVING UNITS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|---|-------|---------------------------|-------|-----|-------|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 76 | 76 | Walker Methodist | MN | 1,034 | 493 | 165 | 376 | 6 | 1 | 4 | 1 | 0 |
| 77 | 72 | Springpoint Senior Living | NJ | 1,601 | 1,180 | 164 | 257 | 5 | 5 | 0 | 0 | 0 |
| 78 | 79 | Oakwood Lutheran Senior Ministries | WI | 885 | 588 | 160 | 137 | 2 | 2 | 0 | 0 | 0 |
| 79 | 77 | Lifespace Communities, Inc. | IA | 4,085 | 3,104 | 154 | 827 | 12 | 12 | 0 | 0 | 0 |
| 80 | 80 | Elant | NY | 995 | 148 | 144 | 703 | 6 | 1 | 0 | 1 | 4 |
| 81 | 83 | Presbyterian Communities and Services | TX | 864 | 334 | 139 | 391 | 2 | 2 | 0 | 0 | 0 |
| 82 | 85 | Christian Care Centers | TX | 879 | 402 | 137 | 340 | 3 | 3 | 0 | 0 | 0 |
| 83 | 84 | Sears Methodist Retirement System, Inc. | TX | 1,097 | 529 | 136 | 432 | 6 | 5 | 0 | 0 | 1 |
| 84 | 82 | Morningside Ministries | TX | 793 | 321 | 136 | 336 | 3 | 3 | 0 | 0 | 0 |
| 85 | 78 | United Church Homes | OH | 977 | 177 | 136 | 664 | 6 | 4 | 0 | 0 | 2 |
| 86 | 86 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 1,410 | 60 | 135 | 1,215 | 6 | 2 | 0 | 0 | 4 |
| 87 | 87 | The Presbyterian Homes, Inc. of North Carolina | NC | 956 | 634 | 133 | 189 | 3 | 3 | 0 | 0 | 0 |
| 88 | 70 | Air Force Villages | TX | 1,013 | 748 | 129 | 136 | 3 | 2 | 0 | 1 | 0 |
| 89 | 88 | LutherCare | PA | 840 | 483 | 128 | 229 | 3 | 1 | 1 | 0 | 1 |
| 90 | ** NR | Westminster Ingleside Retirement Communities | DC | 878 | 608 | 124 | 146 | 3 | 3 | 0 | 0 | 0 |
| 91 | 91 | Northern California Presbyterian Homes and Services | CA | 1,089 | 826 | 122 | 141 | 4 | 3 | 1 | 0 | 0 |
| 92 | 90 | Hebrew SeniorLife | MA | 1,593 | 660 | 119 | 814 | 4 | 2 | 1 | 0 | 1 |
| 93 | 95 | Episcopal Senior Communities | CA | 1,505 | 1,024 | 105 | 376 | 7 | 6 | 0 | 0 | 1 |
| 94 | 93 | United Methodist Retirement Homes, Inc. | NC | 937 | 630 | 101 | 206 | 3 | 3 | 0 | 0 | 0 |
| 95 | 94 | Goodwin House Incorporated | VA | 838 | 590 | 99 | 149 | 2 | 2 | 0 | 0 | 0 |
| 96 | ** NR | Givens Estates Retirement Community | NC | 820 | 599 | 91 | 130 | 2 | 2 | 0 | 0 | 0 |
| 97 | 96 | United Church Homes & Services | NC | 944 | 526 | 90 | 328 | 3 | 3 | 0 | 0 | 0 |
| 98 | 98 | St. Ann's Community | NY | 863 | 246 | 75 | 542 | 2 | 2 | 0 | 0 | 0 |
| 99 | 99 | Mather LifeWays | IL | 900 | 623 | 46 | 231 | 5 | 2 | 2 | 0 | 1 |
| 100 | 100 | Bethesda Health Group, Inc.* | MO | 1,522 | 627 | 34 | 861 | 8 | 2 | 4 | 0 | 2 |

^A All ALUs are designated as Personal/Residential Care Units

^B Some ALUs are designated as Personal/Residential Care Units

* No data received from provider for current reporting year

** NR: Not Ranked in that year

3-1 2013 LeadingAge Ziegler 100

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

3-1d RANKED BY NURSING CARE BEDS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|---|-------|---------------------------|--------|-------|--------|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 1 | 1 | Evangelical Lutheran Good Samaritan Society | SD | 18,462 | 4,984 | 2,170 | 11,308 | 180 | 78 | 9 | 36 | 57 |
| 2 | 2 | Christian Homes, Inc. | IL | 2,706 | 676 | 280 | 1,750 | 14 | 13 | 0 | 0 | 1 |
| 3 | 4 | ACTS Retirement-Life Communities, Inc. | PA | 8,069 | 5,759 | 877 | 1,433 | 23 | 23 | 0 | 0 | 0 |
| 4 | 5 | Presbyterian Homes and Services | MN | 6,582 | 3,294 | 1,940 | 1,348 | 39 | 13 | 21 | 3 | 2 |
| 5 | 3 | Volunteers of America | VA | 2,532 | 482 | 707 | 1,343 | 25 | 5 | 2 | 8 | 10 |
| 6 | 6 | Presbyterian Senior Living | PA | 3,176 | 1,425 | 499 | 1,252 | 20 | 12 | 5 | 2 | 1 |
| 7 | 7 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 1,410 | 60 | 135 | 1,215 | 6 | 2 | 0 | 0 | 4 |
| 8 | 8 | National Senior Campuses | MD | 17,324 | 15,280 | 917 | 1,127 | 15 | 15 | 0 | 0 | 0 |
| 9 | 9 | Presbyterian Manors of Mid-America | KS | 2,499 | 888 | 555 | 1,056 | 18 | 16 | 0 | 1 | 1 |
| 10 | 10 | Elim Care | MN | 1,638 | 190 | 441 | 1,007 | 19 | 1 | 2 | 7 | 9 |
| 11 | 11 | Diakon Lutheran Social Ministries | PA | 2,449 | 901 | 576 | 972 | 11 | 8 | 0 | 3 | 0 |
| 12 | 12 | Lutheran Senior Services | MO | 3,277 | 1,661 | 709 | 907 | 11 | 9 | 0 | 1 | 1 |
| 13 | 14 | Bethesda Health Group, Inc.* | MO | 1,522 | 627 | 34 | 861 | 8 | 2 | 4 | 0 | 2 |
| 14 | 50 | The Eddy | NY | 1,673 | 502 | 313 | 858 | 11 | 5 | 0 | 1 | 5 |
| 15 | 16 | Lifespace Communities, Inc. | IA | 4,085 | 3,104 | 154 | 827 | 12 | 12 | 0 | 0 | 0 |
| 16 | 18 | Hebrew SeniorLife | MA | 1,593 | 660 | 119 | 814 | 4 | 2 | 1 | 0 | 1 |
| 17 | ** NR | Magnolia Manor, Inc.* | GA | 1,483 | 339 | 335 | 809 | 8 | 2 | 4 | 1 | 1 |
| 18 | 19 | Ecumen | MN | 2,545 | 288 | 1,451 | 806 | 40 | 0 | 4 | 27 | 9 |
| 19 | 13 | Covenant Retirement Communities | IL | 4,612 | 3,087 | 720 | 805 | 14 | 12 | 1 | 1 | 0 |
| 20 | 20 | Ohio Presbyterian Retirement Services | OH | 3,034 | 1,723 | 515 | 796 | 11 | 9 | 2 | 0 | 0 |
| 21 | 17 | Augustana Care Corporation | MN | 1,896 | 80 | 1,035 | 781 | 18 | 0 | 6 | 6 | 6 |
| 22 | 15 | Franciscan Communities | IL | 1,912 | 751 | 385 | 776 | 8 | 4 | 1 | 3 | 0 |
| 23 | 21 | Westminster Communities of Florida | FL | 3,299 | 2,088 | 460 | 751 | 10 | 8 | 2 | 0 | 0 |
| 24 | 22 | Lutheran Life Communities | IL | 1,256 | 233 | 283 | 740 | 5 | 3 | 0 | 2 | 0 |
| 25 | 23 | Lutheran Services for the Aging | NC | 1,274 | 257 | 285 | 732 | 8 | 1 | 1 | 1 | 5 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

3-1 2013 LeadingAge Ziegler 100

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

3-1d RANKED BY NURSING CARE BEDS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|---|-------|---------------------------|-------|-----|-----|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 26 | 24 | Cornerstone Affiliates | CA | 2,970 | 1,766 | 484 | 720 | 11 | 11 | 0 | 0 | 0 |
| 27 | 25 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 1,601 | 259 | 628 | 714 | 8 | 1 | 2 | 4 | 1 |
| 28 | 32 | Otterbein Senior Lifestyle Choices | OH | 1,797 | 744 | 350 | 703 | 10 | 5 | 0 | 0 | 5 |
| 29 | 26 | Elant | NY | 995 | 148 | 144 | 703 | 6 | 1 | 0 | 1 | 4 |
| 30 | 27 | Providence Life Services | IL | 1,979 | 808 | 472 | 699 | 11 | 1 | 5 | 1 | 4 |
| 31 | 29 | Masonic Villages | PA | 2,325 | 1,397 | 259 | 669 | 5 | 3 | 1 | 1 | 0 |
| 32 | 30 | Phoebe Ministries | PA | 1,218 | 380 | 171 | 667 | 4 | 3 | 0 | 0 | 1 |
| 33 | 28 | United Church Homes | OH | 977 | 177 | 136 | 664 | 6 | 4 | 0 | 0 | 2 |
| 34 | 33 | American Baptist Homes of the Midwest * | MN | 1,200 | 374 | 209 | 617 | 8 | 4 | 1 | 2 | 1 |
| 35 | 31 | Retirement Housing Foundation | CA | 4,112 | 2,639 | 878 | 595 | 18 | 9 | 8 | 1 | 0 |
| 36 | 34 | St. Ann's Community | NY | 863 | 246 | 75 | 542 | 2 | 2 | 0 | 0 | 0 |
| 37 | 42 | National Church Residences | OH | 1,691 | 705 | 446 | 540 | 7 | 4 | 0 | 2 | 1 |
| 38 | 35 | Front Porch | CA | 2,551 | 1,571 | 441 | 539 | 10 | 8 | 2 | 0 | 0 |
| 39 | 36 | Masonicare | CT | 1,266 | 458 | 272 | 536 | 5 | 1 | 1 | 1 | 2 |
| 40 | 37 | Greencroft | IN | 1,451 | 530 | 388 | 533 | 6 | 6 | 0 | 0 | 0 |
| 41 | ** NR | Los Angeles Jewish Home for the Aged * | CA | 1,092 | 159 | 423 | 510 | 3 | 1 | 2 | 0 | 0 |
| 42 | 39 | Asbury Communities | MD | 2,775 | 1,943 | 334 | 498 | 5 | 5 | 0 | 0 | 0 |
| 43 | 43 | Lutheran SeniorLife | PA | 1,158 | 373 | 327 | 458 | 7 | 2 | 5 | 0 | 0 |
| 44 | 44 | Homewood Retirement Centers | MD | 1,631 | 907 | 273 | 451 | 6 | 6 | 0 | 0 | 0 |
| 45 | 40 | The Kendal Corporation | PA | 3,389 | 2,508 | 433 | 448 | 15 | 13 | 2 | 0 | 0 |
| 46 | 41 | Sears Methodist Retirement System, Inc. | TX | 1,097 | 529 | 136 | 432 | 6 | 5 | 0 | 0 | 1 |
| 47 | 46 | Eskaton | CA | 1,564 | 530 | 608 | 426 | 13 | 1 | 3 | 6 | 3 |
| 48 | 47 | United Methodist Homes* | NY | 1,059 | 395 | 238 | 426 | 4 | 3 | 0 | 1 | 0 |
| 49 | 49 | Presbyterian SeniorCare | PA | 1,065 | 359 | 285 | 421 | 3 | 3 | 0 | 0 | 0 |
| 50 | 51 | Presbyterian Communities and Services | TX | 864 | 334 | 139 | 391 | 2 | 2 | 0 | 0 | 0 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

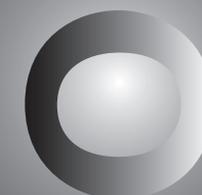
3-1 2013 LeadingAge Ziegler 100

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

3-1d RANKED BY NURSING CARE BEDS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|--|-------|---------------------------|-------|-----|-----|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 51 | 45 | Pacific Retirement Services, Inc. | OR | 2,824 | 2,092 | 344 | 388 | 9 | 8 | 1 | 0 | 0 |
| 52 | 55 | Walker Methodist | MN | 1,034 | 493 | 165 | 376 | 6 | 1 | 4 | 1 | 0 |
| 53 | 54 | Episcopal Senior Communities | CA | 1,505 | 1,024 | 105 | 376 | 7 | 6 | 0 | 0 | 1 |
| 54 | 56 | WesleyLife | IA | 1,330 | 695 | 261 | 374 | 7 | 7 | 0 | 0 | 0 |
| 55 | 53 | Presbyterian Homes | IL | 1,446 | 859 | 224 | 363 | 4 | 4 | 0 | 0 | 0 |
| 56 | 58 | Lutheran Social Services of South Central Pennsylvania | PA | 1,150 | 555 | 251 | 344 | 6 | 6 | 0 | 0 | 0 |
| 57 | 57 | Christian Care Centers | TX | 879 | 402 | 137 | 340 | 3 | 3 | 0 | 0 | 0 |
| 58 | 59 | Morningside Ministries | TX | 793 | 321 | 136 | 336 | 3 | 3 | 0 | 0 | 0 |
| 59 | 60 | Shell Point | FL | 2,042 | 1,337 | 377 | 328 | 2 | 2 | 0 | 0 | 0 |
| 60 | 61 | United Church Homes & Services | NC | 944 | 526 | 90 | 328 | 3 | 3 | 0 | 0 | 0 |
| 61 | 62 | Baptist Village Retirement Communities of Oklahoma | OK | 1,276 | 770 | 181 | 325 | 8 | 3 | 5 | 0 | 0 |
| 62 | 63 | Lutheran Homes of South Carolina | SC | 1,038 | 386 | 328 | 324 | 5 | 5 | 0 | 0 | 0 |
| 63 | 64 | Mississippi Methodist Senior Services | MS | 1,390 | 805 | 265 | 320 | 11 | 2 | 7 | 0 | 2 |
| 64 | 65 | Wesley Enhanced Living | PA | 1,016 | 502 | 214 | 300 | 6 | 5 | 0 | 1 | 0 |
| 65 | 78 | Concordia Lutheran Ministries | PA | 1,745 | 554 | 901 | 290 | 10 | 3 | 0 | 7 | 0 |
| 66 | 66 | Buckner Retirement Services, Inc. | TX | 1,471 | 870 | 315 | 286 | 7 | 5 | 2 | 0 | 0 |
| 67 | 67 | EMA, Inc. | MD | 1,156 | 651 | 228 | 277 | 4 | 3 | 0 | 1 | 0 |
| 68 | 68 | Willow Valley Retirement Communities | PA | 1,997 | 1,501 | 219 | 277 | 3 | 3 | 0 | 0 | 0 |
| 69 | 70 | Presbyterian Communities of South Carolina | SC | 848 | 292 | 290 | 266 | 5 | 5 | 0 | 0 | 0 |
| 70 | 72 | Holland Home | MI | 1,419 | 723 | 435 | 261 | 4 | 2 | 0 | 1 | 1 |
| 71 | 71 | Senior Quality Lifestyles Corporation | TX | 1,587 | 989 | 337 | 261 | 5 | 5 | 0 | 0 | 0 |
| 72 | 73 | Presby's Inspired Life | PA | 947 | 469 | 218 | 260 | 4 | 2 | 1 | 0 | 1 |
| 73 | 74 | United Methodist Memorial Home | IN | 917 | 189 | 469 | 259 | 4 | 3 | 0 | 1 | 0 |
| 74 | 75 | Virginia United Methodist Homes, Inc. | VA | 1,209 | 628 | 324 | 257 | 7 | 6 | 0 | 1 | 0 |
| 75 | 69 | Springpoint Senior Living | NJ | 1,601 | 1,180 | 164 | 257 | 5 | 5 | 0 | 0 | 0 |

LeadingAge



Ziegler

3-1 2013 LeadingAge Ziegler 100

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

3-1d RANKED BY NURSING CARE BEDS

| 2013 Rank | 2012 Rank | System Name | State | Units (as of 12/31/12) | | | | Communities (as of 12/31/12) | | | | |
|-----------|-----------|---|-------|---------------------------|-------|-------|-----|---------------------------------|------|----|----|----|
| | | | | Total | ILU | ALU | NCB | Total | CCRC | IL | AL | NH |
| 76 | 76 | United Methodist Homes of New Jersey | NJ | 1,028 | 88 | 688 | 252 | 5 | 1 | 0 | 4 | 0 |
| 77 | ** NR | Friendship Senior Options | IL | 1,239 | 806 | 185 | 248 | 2 | 2 | 0 | 0 | 0 |
| 78 | 77 | Cedar Community | WI | 881 | 431 | 203 | 247 | 5 | 2 | 1 | 1 | 1 |
| 79 | 79 | VMP | WI | 889 | 447 | 205 | 237 | 2 | 2 | 0 | 0 | 0 |
| 80 | 80 | be.group | CA | 1,473 | 851 | 390 | 232 | 9 | 6 | 0 | 3 | 0 |
| 81 | 81 | Mather LifeWays | IL | 900 | 623 | 46 | 231 | 5 | 2 | 2 | 0 | 1 |
| 82 | 84 | LutherCare | PA | 840 | 483 | 128 | 229 | 3 | 1 | 1 | 0 | 1 |
| 83 | 82 | Virginia Baptist Homes | VA | 1,211 | 764 | 227 | 220 | 4 | 4 | 0 | 0 | 0 |
| 84 | 83 | Menno Haven | PA | 920 | 531 | 177 | 212 | 3 | 2 | 1 | 0 | 0 |
| 85 | 85 | United Methodist Retirement Homes, Inc. | NC | 937 | 630 | 101 | 206 | 3 | 3 | 0 | 0 | 0 |
| 86 | 86 | Simpson Senior Services | PA | 858 | 494 | 172 | 192 | 3 | 3 | 0 | 0 | 0 |
| 87 | 88 | The Presbyterian Homes, Inc. of North Carolina | NC | 956 | 634 | 133 | 189 | 3 | 3 | 0 | 0 | 0 |
| 88 | 89 | Presbyterian Villages of Michigan | MI | 1,052 | 588 | 286 | 178 | 8 | 2 | 6 | 0 | 0 |
| 89 | 91 | Goodwin House Incorporated | VA | 838 | 590 | 99 | 149 | 2 | 2 | 0 | 0 | 0 |
| 90 | ** NR | Westminster Ingleside Retirement Communities | DC | 878 | 608 | 124 | 146 | 3 | 3 | 0 | 0 | 0 |
| 91 | 95 | Living Branches | PA | 852 | 463 | 246 | 143 | 3 | 2 | 0 | 1 | 0 |
| 92 | 92 | Northern California Presbyterian Homes and Services | CA | 1,089 | 826 | 122 | 141 | 4 | 3 | 1 | 0 | 0 |
| 93 | 93 | Oakwood Lutheran Senior Ministries | WI | 885 | 588 | 160 | 137 | 2 | 2 | 0 | 0 | 0 |
| 94 | 90 | Air Force Villages | TX | 1,013 | 748 | 129 | 136 | 3 | 2 | 0 | 1 | 0 |
| 95 | ** NR | Givens Estates Retirement Community | NC | 820 | 599 | 91 | 130 | 2 | 2 | 0 | 0 | 0 |
| 96 | 96 | Elder Care Alliance | CA | 803 | 39 | 657 | 107 | 6 | 1 | 0 | 5 | 0 |
| 97 | 97 | Western Home Communities | IA | 793 | 463 | 230 | 100 | 3 | 1 | 2 | 0 | 0 |
| 98 | 98 | Christian Care Companies | AZ | 1,786 | 1,434 | 284 | 68 | 4 | 1 | 3 | 0 | 0 |
| 99 | 99 | SantaFe Senior Living | FL | 976 | 731 | 185 | 60 | 3 | 1 | 2 | 0 | 0 |
| 100 | 100 | Bethesda Senior Living Communities | CO | 1,250 | 204 | 1,046 | 0 | 14 | 0 | 3 | 11 | 0 |

** NR: Not Ranked in that year

3-1 2013 LeadingAge Ziegler 100

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

3-1e THE NEXT 50

The LZ 100 stops at the 100th largest system, leaving a number of senior living systems just beyond the list's cut-off. No 2013 submission was received for organizations noted with a '*'.

First 25 (673 to 788 Total Units)

Albright Care Services (PA)
BHI Senior Living (IN)
CRISTA Senior Ministries (WA)*
Christian Care Communities (KY)
Christian Living Communities (CO)
Deaconess Abundant Life Communities (MA)
Eventide Senior Living Communities (MN)
Garden Spot Village (PA)
Life Enriching Communities (OH)
LifeStream Complete Senior Living (AZ)
Luther Manor (WI)
Lutheran Homes of Michigan (MI)
Lutheran Homes Society (OH)
Lutheran Social Ministries of New Jersey (NJ)
Lutheran Social Services of Michigan (MI)
Maple Knoll Communities (OH)
Messiah Lifeways (PA)
Methodist Retirement Communities and Affiliates (TX)
St. John's Lutheran Ministries (MT)
St. Therese Homes, Inc. (MN)
Sunnyside Communities (VA)
The Ohio Masonic Home (OH)
United Church of Christ Homes (PA)*
Vincentian Collaborative System (PA)
Wesley Homes (WA)

Second 25 (542 to 666 Total Units)

Asbury Place (TN)
Baptist Homes Society (PA)*
Baptist Life Communities (KY)
Baptist Retirement Homes of North Carolina, Inc. (NC)*
Church Homes Inc. (CT)
Friends Homes, Inc. (NC)
Heritage Ministries (NY)*
Liberty Lutheran Services (PA)
Life Care Pastoral Services (FL)
LindenGrove (WI)
Loomis Communities (MA)
Lutheran Life Villages (IN)
Lutheran Social Services of the South (TX)
Masonic Homes of California (CA)*
Masonic Homes of Kentucky (KY)
Medford Leas (NJ)
Mercy Community Health (CT)
Porter Hills Retirement Communities & Services (MI)
Presbyterian Retirement Communities Northwest (WA)
Shepherd of the Valley Lutheran Retirement Services (OH)*
Smith Senior Living (IL)
Sunset Retirement Communities and Services (MI)
The RiverWoods Company (NH)
United Methodist Homes (CT)
Waterman Village (FL)

3-1 2013 LeadingAge Ziegler 100

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

3-1f THE NEXT "NEXT" 50

The universe of multi-site senior living systems includes many smaller systems. Listed alphabetically below are those beyond the 150 systems already listed. No 2013 submission was received for organizations noted with a '*'.

First 25 (419 to 539 Total Units)

Allegheny Lutheran Social Ministries (PA)
 Beechwood Continuing Care (NY)*
 Brazos Presbyterian Homes (TX)*
 Cadbury Senior Services (NJ)
 Clark Retirement Communities (MI)
 Eliza Jennings Senior Care Network (OH)*
 Evangelical Homes of Michigan (MI)
 Judson Services, Inc. (OH)
 LutheranLiving Services (WI)
 Lutheran Social Services of Illinois (IL)
 Midwest Geriatrics, Inc. (NE)*
 Milwaukee Protestant Home (WI)*
 National Lutheran Communities & Services (MD)
 Niagara Lutheran Health System (NY)
 Presbyterian Homes & Services (NY)*
 Presbyterian Homes and Services of Kentucky (KY)*
 Presbyterian Homes of Georgia (GA)*
 Redstone Presbyterian SeniorCare (PA)*
 Rockwood Retirement Communities (WA)
 South Carolina Baptist Ministries for the Aging (SC)*
 The Lutheran Home Association (MN)
 United Methodist Services for the Aging (PA)
 Wesbury United Methodist Retirement Community (PA)
 Wesleyan Senior Living (OH)
 Willow Brook Christian Communities (OH)

Second 25 (298 to 409 Total Units)

Appalachian Christian Village (TN)
 Bethesda Health & Housing (MN)*
 California-Nevada Methodist Homes (CA)*
 CJE SeniorLife (IL)
 Colonial Senior Services (OH)
 Crest View Senior Communities (MN)*
 Episcopal Communities & Services (CA)
 Episcopal Retirement Homes Inc. (OH)
 Episcopal SeniorLife Communities (NY)
 Good Shepherd Communities (NY)*
 Jewish Senior Life of Metropolitan Detroit (MI)*
 Homme, Inc. of Wisconsin (WI)
 Lincoln Lutheran (WI)
 Lutheran Homes of Oshkosh (WI)*
 Lutheran Social Services of Central Ohio (OH)
 Lyngblomsten (MN)*
 Presbyterian Homes of Lake Erie (PA)
 Resthaven (MI)
 The Glen Retirement System (LA)*
 The Wartburg Adult Care Community (NY)
 Three Pillars Senior Living Communities (WI)
 United Methodist Retirement Communities (MI)
 Valley View Haven, Inc. (PA)*
 Wesley Woods Senior Living (GA)
 WRC Senior Services (PA)

3-2 2013 LeadingAge Ziegler 100

The Rankings: Change at a Glance

3-2a WHO MOVED ON?

| New to 2013 Ranking | State | 2013 Rank |
|--|-------|-----------|
| Magnolia Manor | GA | 42 |
| Friendship Senior Options | IL | 56 |
| Los Angeles Jewish Home | CA | 65 |
| Westminster Ingleside Retirement Communities | DC | 89 |
| Givens Estates Retirement Community | NC | 97 |

Magnolia Manor moved back on the list after a two-year absence.

Friendship Senior Options makes its first appearance in the LZ 100 Primary Ranking.

Los Angeles Jewish Home for the Aged makes its first appearance in the LZ 100 Primary Ranking.

Westminster Ingleside Retirement Communities makes its first appearance in the LZ 100 Primary Ranking.

Givens Estates Retirement Community makes its first appearance in the LZ 100 Primary Ranking.

3-2b GREATEST CHANGES IN UNITS

| Greatest Increase and Decrease | State | YE 2012 Units | YE 2011 Units | Change |
|---|-------|---------------|---------------|--------|
| Greatest Increase | | | | |
| The Eddy | NY | 1,673 | 1,230 | + 443 |
| Concordia Lutheran Ministries | PA | 1,745 | 1,400 | + 345 |
| The Kendal Corporation | IA | 3,389 | 3,132 | + 257 |
| Presbyterian Homes and Services | IL | 6,582 | 6,342 | + 240 |
| Ohio Presbyterian Retirement Services | OH | 3,034 | 2,805 | + 229 |
| Greatest Decrease | | | | |
| Franciscan Communities | IL | 1,912 | 2,407 | - 495 |
| Evangelical Lutheran Good Samaritan Society | SD | 18,462 | 18,934 | - 472 |
| SantaFe Senior Living | FL | 976 | 1,276 | - 300 |
| Retirement Housing Foundation | CA | 4,112 | 4,289 | - 177 |
| be.group | CA | 1,473 | 1,615 | - 142 |

3-2 2013 LeadingAge Ziegler 100

The Rankings: Change at a Glance

3-2c GREATEST CHANGES IN RANK

| Greatest Upward and Downward Change | State | 2013 Rank | 2012 Rank | Change |
|--|-------|-----------|-----------|--------|
| Greatest Upward Movement | | | | |
| The Eddy | NY | 32 | 54 | + 22 |
| Concordia Lutheran Ministries | PA | 30 | 46 | + 16 |
| National Church Residences | MD | 31 | 38 | + 7 |
| Magnolia Manor | GA | 42 | *NR | -- |
| Friendship Senior Options | IL | 56 | *NR | -- |
| Los Angeles Jewish Home for the Aged | CA | 65 | *NR | -- |
| Westminster Ingleside Retirement Communities | DC | 89 | *NR | -- |
| Givens Estates Retirement Community | NC | 97 | *NR | -- |
| Greatest Downward Movement | | | | |
| SantaFe Senior Living | FL | 77 | 49 | - 29 |
| VMP | WI | 85 | 73 | - 13 |
| be.group | CA | 43 | 32 | - 11 |
| Air Force Villages | TX | 74 | 64 | - 10 |

* NR: Not Ranked in that year

Chapter 4

Analysis of the Data

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

- Total units are composed of independent living units (ILU), assisted living units (ALU) and nursing care beds (NCB) - including Medicare- and Medicaid-certified units.
- Only not-for-profit LeadingAge member organizations are on the list, and all multi-site organizations are considered for inclusion unless predominantly a health care system or unless nearly all of the system's units are nursing (such as Jewish Home Lifecare, with NCBs composing 100 percent of its market-rate unit mix).
- The number of government-subsidized (affordable housing) units is excluded from the count that determines whether an organization is listed.
- The LZ 100 is ranked by total units owned and operated by the systems (managed units that are not owned are excluded for purposes of the **Primary Ranking** and are presented in Charts 4-16a-c). The 2013 LZ 100 publication's breakdown of the data begins with a parallel set of analyses, examining first a comparison of the unit mix between 2012 and 2011 for each of the organizations, then examining the community mix.

Units

The first analysis of the 2013 LZ 100 provides a side-by-side comparison of the unit mix for 2012 compared to 2011 for each of the organizations. The 2013 LZ 100 organizations own approximately 201,000 market-rate senior living units. By breaking the data into the largest 10, 25 and 50 (Charts 4-1b-c), one sees that the ratio of units held by the largest 50 compared with the percentage of total units in the LZ 100 is not balanced, e.g., the largest 50 systems hold more than 50 percent of the total units, in fact, 75 percent of the total. The 10 largest systems own 36 percent of the total LZ 100 units. Closer examination of the data shows that ILUs are a driving factor in building the size of a system. Nearly 51 percent of the average system's total units are ILUs, with roughly 18 percent composed of ALUs, and approximately 31 percent composed of NCBs. Approximately 53 percent of the 2013 LZ 100's total communities are CCRCs, with the remaining nearly 47 percent fairly evenly divided between stand-alone ILs, ALs, and NHs.

The largest multi-site on the 2013 LZ 100 **Primary Ranking** (Chart 3-1a) is Evangelical Lutheran Good Samaritan Society (ELGSS), an organization with a unit mix significantly different from the average for the LZ 100 (Chart 4-1b); nearly two-thirds of this multi-site's units are nursing care beds. When the unit mix of ELGSS is removed from the combined unit mix of the largest 10, the proportion of nursing beds in this largest 10 group decreases from nearly 30 to 15 percent of the total mix and the proportion of ILUs increases from approximately 60 to 72 percent, accentuating the prominence of ILUs among the largest of the LZ 100 multi-sites. When ELGSS is removed from the community mix of the largest 10 providers, nursing homes as a percentage of community type decline from nearly 20 percent to two percent. The percentage of CCRCs increases from approximately 56 percent to 72 percent. ELGSS is apparently taking steps to realign its unit mix; since 2006, the organization has disposed of nineteen (19) nursing homes and continued to dispose of nursing units in 2012.

The average system within the 2013 LZ 100 had nearly 2,004 units in 2012, as compared to 2,008 units in 2011 and 1,990 units in 2010 (Chart 4-1b). Forty percent of the 2013 LZ 100 reported a net reduction in the number of units between 2012 and 2011, an increase from approximately 30 percent last year. Additionally, 27 reported no net change in the number of units between 2012 and 2011. The remaining organizations (roughly one-third) had net increases in the number of units between 2012 and 2011.

Summary of Not-for-Profit Units. These columns show the total number of units, followed by a breakdown of this total by level of care, for each of the systems. The first set of columns shows the unit mix as of 12/31/12. The second set of columns shows the unit mix as of 12/31/11.

Change in Total Units from 2011 to 2012. This column provides the change in the listed organization's TOTAL units (all levels of care) between year-end 2012 and year-end 2011.

Chart 4-1b provides two examinations of three-year comparisons of the LZ 100 organizations. The first half of the chart examines the unit mix between each of the three years' LZ 100 listings (e.g., the unit mix of the 2011 LZ 100 compared to the unit mix of the 2012 LZ 100, compared to the unit mix of the 2013 LZ 100). The latter half of the chart examines the 2013 LZ 100 for each of these periods ("same-store" analysis). Charts 4-1d-h provides a more graphic illustration of the type of change occurring in the LZ 100. For example, note in Chart 4-1h the relatively static number of NCBs within the systems, while both ILUs and ALUs have average annual growth rates of 3.5 percent and 3.9 percent respectively for the past ten years.

Communities

The unit analysis of the 2013 LZ 100 presented in Chart 4-1a is followed by a side-by-side comparison in Chart 4-2a of the community portfolios of the 2013 LZ 100 for 2012 compared to their portfolios in 2011.

Summary of Not-for-profit Communities. Community, as noted earlier, is the term used to refer to any type of community owned by the LZ 100, whether stand-alone nursing home (NH), assisted living community (AL), independent living community (IL), or CCRC. Again, government-subsidized (affordable) housing properties are excluded from the count of communities shown for the LZ 100 (these properties are examined in Charts 4-15a-c and in Chapter 6). The first set of columns in Chart 4-2a shows the communities owned, by type, as of 12/31/12. The second set of columns shows the communities owned, by type, as of 12/31/11. The 2013 LZ 100 own 961 total communities, an increase of 18 communities over the 2012 LZ 100. The breakdown of data by communities (Charts 4-2a-h) illustrates an outcome similar to that of the units' data (Charts 4-1a-h): the largest 50 in the LZ 100 own 77 percent of all communities. CCRCs comprise the greatest proportion of communities owned. More than 50 percent of the portfolio for the 2013 LZ 100 is CCRCs.

Change in Total Communities from 2011 to 2012. This column provides the change in the listed organization's TOTAL communities (all types, excluding affordable housing) between year-end 2011 and year-end 2012. A net total of eighteen (18) communities were added during 2012 by the 2013 LZ 100. A same-store analysis of the 2013 LZ 100 shows a roughly 18 percent increase in the number of communities over the past ten years (Chart 4-2d). The activity of adding or disposing of communities was unevenly spread between the largest 50 of the 2013 LZ 100 and those in the bottom half. Seven of the systems on the LZ 100 listing had a net reduction of at least one community.

Chart 4-2b provides two examinations of three-year comparisons of the LZ 100 organizations. The first half of the chart examines the community holdings between each of the three years' LZ 100 listings (e.g., the types of communities owned by the 2011 LZ 100 compared to types of communities owned by the 2012 LZ 100, compared to the types of communities owned by the 2013 LZ 100). The latter half of the chart examines the 2013 LZ 100 for each of these periods ("same-store" analysis).

Both examinations illustrate the shift away from institutionalized, high-level care to more residential and home care settings. The 2013 LZ 100's nursing communities declined from 22.7 percent in 2000 to 15.8 percent of the community mix in 2012.

The "same-store" analysis of the growth of the 2013 LZ 100 by unit type and by level of care from 2000 to 2012 (Charts 4-1h and 4-2h) helps to explain how this transition is occurring. These charts show that although nursing beds have increased, albeit slightly, over time, the number of nursing homes has declined. Proportionally speaking, nursing care beds have decreased as a percent of community mix each year since 2000. (Chart 4-2g). The underlying data show that the number of nursing beds is primarily increasing through the growth of CCRCs and assisted living communities adding nursing beds.

Locations

The LZ 100 own and operate communities in 44 states. A state map provides a view of each state by the number of communities there owned by the LZ 100 (Chart 4-3a). Chart 4-3b ranks each of the different community types by the states in which they are owned. Minnesota continues to top the list for IL, AL and NH communities; Pennsylvania continues to top the list for CCRC locations. The state with the largest number of LZ 100-owned communities is Minnesota (160). States that one might expect to have a higher number of communities, such as New York or California, are home to a number of health system-sponsored senior living organizations or primarily government-subsidized senior living providers, which are not included in the LZ 100 **Primary Ranking**. A map with the locations of CCRCs owned by the 2013 LZ 100 (Chart 4-3c) shows the dominance of Pennsylvania and California. The locations of the IL, AL and NH communities owned by the LZ 100 highlight the prominence of Minnesota noted above in each of these areas (Charts 4-3d-f).

System Headquarters

The state shown for each of the LZ 100 indicates their headquarters' location. Pennsylvania is home to more LZ 100 headquarters than any other state (18 headquarters), more than twice as many as the next leading states of California, Texas, Illinois, Minnesota, and New York (Chart 4-4a). Six of the 18 Pennsylvania multi-sites' headquarters are in the largest 25. Though most consider Florida home to a higher count of senior living communities than most other states (and, as shown in Chart 4-3b, it is one of the top states for CCRC locations), only three of the LZ 100 systems have headquarters in the state. Chart 4-4c offers a geographic view of the size of the LZ 100 organizations, with Pennsylvania and the mid-Atlantic area hosting the greatest density of LZ 100 in both number of organizations and size of organizations. The Midwest region has the second highest density.

Metropolitan Statistical Areas (MSAs)

Metropolitan Statistical Areas (MSAs) are areas defined by the Office of Management and Budget (OMB) for purposes of tabulating statistics on clearly defined metropolitan boundaries. These boundaries are based on Census 2000 data and applied by preset rules. They were announced by OMB effective June 6, 2003. Areas are identified by county, with several counties making up a particular MSA.

The National Investment Center for the Seniors Housing & Care Industries (NIC) has developed a database that provides a comprehensive tool for understanding supply and demand for the top 100 metropolitan statistical areas (MSAs) called the Market Area Profiles, or MAP™. The MAP™ data and analysis allow management staff of a multi-site access to data on operating performance in their MSAs as well as their defined local market.

The locations of the communities owned by LZ 100 organizations in the largest 30 MSAs tracked by the MAP™ study are charted, showing the number and type of communities within each of the MSAs (Charts 4-5a-c). The communities of the LZ 100 organizations are located in 30 of the 30 MSAs; with 392 out of 960 (40.8 percent) of the LZ 100 organizations' communities in those MSAs. Minneapolis/St. Paul is the MSA with the highest number of communities, a finding consistent with Minnesota's dominance in the count of IL, AL and NH communities (Chart 4-5b); Los Angeles and Pittsburgh continue to top the list of the MSAs hosting the LZ 100's affordable housing; Detroit and New York City follow closely behind. (Chart 4-5c)

Classifications

A multi-site's geographic market area, what the LZ 100 listing terms its primary classification, offers a descriptive glimpse of the location of the multi-site's senior living properties (Chart 4-6a). A multi-site's primary classification describes the market area that includes ALL of its properties, regardless of type (including government-subsidized senior living). For some, the market area may be established by implicit boundaries, due to regulatory constraints or even due to the system's own name. Some multi-sites may change their names, as we'll discuss further, to more accurately reflect new growth strategies.

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

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

Definitions and examples of the eight market categories are listed below:

- **National.** Systems whose properties are located among multiple states in more than one region of the United States. A number of the 13 national systems focus their operations either west of the Mississippi River or Rocky Mountains or east of the Mississippi. Few of the national systems have an abundance of properties broadly scattered across the country. Examples: Pacific Retirement Services, Inc. (LZ 100 #14) — a national system with a disparate geographic distribution of its communities; locations are primarily on the West Coast, with two communities in Wisconsin and one in Texas. Retirement Housing Foundation (LZ 100 #6) is a national system with communities in multiple states spread across the country.
- **Across States.** Systems whose communities are located among multiple states, primarily in one region of the United States. Example: Presbyterian Senior Living (LZ 100 #11) is classified as an across states system with a focus in the Mid-Atlantic U.S. and one additional community in Ohio.
- **Tri-state.** Systems whose communities are located across three states, typically, contiguous. Example: Elim Care (LZ 100 # 33) has communities located in Iowa, Minnesota, and North Dakota.
- **Bi-state.** Systems whose communities are located across two states, typically, contiguous. Example: Lutheran Life Communities (LZ 100 #54) has communities operating in Illinois and Indiana.
- **Single State.** Systems whose communities are contained within a single state's borders and are spread across multiple regions of the state. Example: SantaFe Senior Living (LZ 100 #77)—multiple communities within Florida, spread across multiple regions of the state (from southeast Florida to north central Florida, east and west).
- **State Region.** Systems whose communities are contained within a single region within a single state's borders. Example: WesleyLife (LZ 100 #50)—multiple communities centrally concentrated in Iowa.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: The Eddy (LZ 100 #32)—multiple communities throughout the Albany, New York, area.
- **Sub-metropolitan.** Systems whose communities are contained within a sub-section of a metropolitan area, that is, they are concentrated in one section of a metropolitan area. The larger the metropolitan area, the more likely the possibility that a multi-site may emerge within a sub-metropolitan area. Example: The communities of Goodwin House Incorporated (LZ 100 #96) are located in the southwestern quadrant of the DC-Arlington metropolitan area.

Chart 4-6b shows that the bulk, nearly 70 percent, of the LZ 100 organizations operate within a single state's boundaries (Single State, State Region, Metropolitan or Sub-metropolitan). Generally, a multi-site moves gradually from a single-state, to a bi-state, to a tri-state, then across states to a national multi-site. For example, Augustana Care Corporation has 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 outside of Minnesota, with the acquisition of a community in Colorado. National multi-sites are 13 percent of the LZ 100 and tend to be among the largest of the LZ 100 organizations, but, as noted earlier, a smaller percentage of these national multi-sites have communities that are broadly spread across the country.

A multi-site may have a secondary market, as well. For example, bi-state multi-site Lutheran Senior Services (LZ 100 #10) has a secondary metropolitan market, with a concentration of communities in St. Louis. For some, a secondary market may reflect differences in service and community type. For example, a multi-site may have a national market spread for its government-subsidized (affordable) housing properties but a smaller spread for its CCRCs. National Church Residences (LZ 100 #31), for example, has its government-subsidized units spread across the nation but its market-rate senior living is in Ohio only.

The secondary classification provides a snapshot of a system's geographic concentration of communities. Just 39 of the LZ 100 systems have such a market concentration. (Chart 4-6c)

Corporate Name Changes

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

Ratings

There are currently three rating agencies that rate senior living debt: Moody's, Standard & Poor's, and Fitch Ratings, two of which, Standard & Poor's and Fitch Ratings, are currently active. A listing of multi-site organizations with debt rated by Standard & Poor's or Fitch Ratings is shown in Chart 4-8a. A multi-site with an "NR" shown as an agency's rating means that the multi-site does not have its debt rated by that agency as of 12/31/12. Systems with senior living communities that have obtained ratings on that particular community's strength, rather than on the credit strength of the multi-site or an obligated group within the multi-site, are not shown on the listing.

Thirty-five (35) of the LZ 100 organizations have outstanding debt rated by Standard & Poor's and/or Fitch Ratings. Chart 4-8b presents the categories of each of the ratings, showing that the majority, 57 percent, of the ratings for LZ 100 organizations fall in the "BBB" category (that is, with ratings of "BBB+," "BBB" or "BBB-").

Revenues

In recent editions of the LZ 100, operating practices of the 25 largest systems were examined with regard to average annual debt and revenue of these organizations. After initial feedback from responding organizations, it was decided that a closer study of various campus-based and non-campus-based revenue sources would be conducted (Chart 4-9). Not surprisingly, campus-based senior living accounts for the majority (85 percent) of the LZ 100's overall annual revenue, with home and community-based services (HCBS) for residents as the next largest source (3.2 percent). Some other additional revenue sources mentioned by respondents include: hospice, child care programs, grants and research, and physician services to residents and non-residents. Comparative annual revenue data will continue to be examined further in subsequent editions of the LZ 100.

Corporate Staff

Yet another area of the 2013 LZ 100 is an analysis of the corporate level staffing of select operating areas for the LZ 100 organizations (Charts 4-10a-b). Between 75 and 80 percent of the LZ 100 have corporate level information technology (IT), fundraising, and marketing positions, the majority of which report to the CEO (except for IT, which generally reports to the CFO). More than 25 percent of the LZ 100 expanded its marketing staffing, a trend which may continue based upon continuing challenges with occupancy among some LZ 100 organizations.

CARF-CCAC Accreditation

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

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

The listing of LZ 100 with organizations that have obtained CARF-CCAC accreditation as of July 31, 2013, is shown in Chart 4-11a. Twenty-seven (27) of the LZ 100 organizations have a CARF-CCAC accredited organization within their system (Chart 4-11b). In 2012, 24 percent of the 2013 LZ 100's CCRCs were accredited (Chart 4-11c). It is interesting to note that 100 percent of the largest 25 systems have at least one accredited community. Additionally, within that same largest 25, 81 percent of the communities are CARF-CCAC accredited.

Residents and Staff

The LZ 100 analyses include an examination of the number of residents served and the number of full-time equivalents (FTEs) they employ. Ninety-four percent of the LZ 100 responded to these questions in this year's survey. Serving a range of residents in one organization, from a low of 715 to a high of 20,114, more than 212,900 are estimated to be served by the 2013 LZ 100. An average of approximately 1,333 FTEs are employed per organization, with a low of 292 FTEs in one organization to a high of 15,133 in another. Note that the number of FTEs per resident had remained fairly steady from 2009 through 2011, but rose in 2012 (Chart 4-12c).

Few measures of FTEs per resident are captured in the senior living sector as a whole. LeadingAge's **Continuing Care Retirement Communities: 2013** Profile shows FTEs per resident of .58 (median figure). This percentage is up from .53 reported in the **2005 Profile**. The survey respondents for the LeadingAge profile were composed entirely of CCRCs but were a mix of single-sites and multi-sites. The all-multi-site LZ 100 is composed of CCRCs, IL, AL and NH; the FTE per resident of the LZ 100 is slightly above the LeadingAge median figure, with an average of .64 FTEs per resident.

One of the factors by which the capital markets evaluate a prospective borrower is the strength of its management team and its leadership. It is in this area that multi-site, not-for-profit organizations can excel, for there is generally stability in leadership marked by long tenure (Chart 4-12d-e), particularly among CEOs, COOs and often among CFOs. Several years ago we began asking each LZ 100 respondent to indicate if the organization had had a change in its CEO, CFO or COO positions during the past year. With most organizations reporting in these areas, the CEO area reported the lowest level of turnover (just three of the 100 reported a change in this position). Turnover in CFOs occurred at five organizations (slightly less than in both 2010 and 2011) and COO changes occurred at eight (a decrease from 11 in 2011). The COO position continues to be fine-tuned within the organizations. The 2013 LZ 100 were asked to describe their key in-house corporate staff positions. Charts 4-10a-b and 4-12f show the degree to which various positions are utilized among this group. In 2012, corporate-level positions in information technology, human resources, fundraising and marketing were most prevalent among these. Fewer systems utilized corporate positions with a legal or HCBS expertise, although both of these positions increased from 2011. The most significant increases in the utilization of corporate staffing were in marketing and HCBS (Chart 4-10b).

Year Founded

The year founded (Chart 4-13a) describes a multi-site's year of inception, when known. Many of the multi-sites in the LZ 100 were founded 50 to more than 100 years ago. If the date of inception was not available and not provided by the LZ 100 organization, then the opening date for the oldest community is used as the "year founded." When the organization is a result of a merger (for example, Living Branches) the date of the oldest of the merged organizations' inception dates is used. Twenty-nine (29) of the LZ 100 have been in operation for 100 or more years. The oldest of the LZ 100 organizations, Lutheran Senior Services (LZ 100 #10), was founded in 1858. The oldest among the "Next 50" (Chart 3-1e) is Maple Knoll Communities, which opened its original community in 1848, through the efforts of Lydia Beecher, Harriet Beecher Stowe's stepmother. Like many, many of the LZ 100, its origins include serving those in need: in the mid-1970s, its flagship campus, Maple Knoll, was developed through the merger of a home for men, a home for women and a home for unwed mothers. None of the LZ 100 have been in operation for 10 years or less: the "youngest" LZ 100 system, Senior Quality Lifestyles Corporation (LZ 100 #38), was founded in 1999. The mean (average) inception date of the LZ 100 organizations is 1937. The median inception date is 1947.

Affiliation

Nearly all of the LZ 100 organizations have an affiliation with a religious organization or a fraternal or military group (Chart 4-14a). Just 13 organizations appear to have no affiliation and were likely formed out of a local community group of interested persons. The majority of those with affiliations are faith-based, predominantly those that are Lutheran, Methodist, Presbyterian and United Church of Christ. Thirty-two of the organizations have a Methodist or Presbyterian affiliation. When classifying the organizations for the affiliation analyses, affiliations with various churches within a denomination were aggregated under the more general denomination's name, e.g. whether affiliated with the Free Methodist or the United Methodist denominations, both are classified as "Methodist." When the LZ 100 units are sorted by affiliation, the Lutheran denomination also has the highest number of units (40,526), approximately 20 percent of the total LZ 100 unit count. When an organization is seeking to affiliate or to dispose of a community within its portfolio, partnership is often sought with an organization of a similar religious or fraternal affiliation.

Affordable Housing

The ranking of the LZ 100 organizations by the number of affordable (non-market-rate) units is included with this research to show that a number of the LZ 100 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management of these organizations and others the opportunity to compare their organizations with others that are providing services to a full spectrum of income levels. Providing government-subsidized senior living, particularly through the HUD 202 program, is a very straightforward way for many organizations to fulfill their missions of providing services to residents with more limited financial resources. Last year's publication showed that 54 percent of the LZ 100 provide affordable housing. The percentage of this year's LZ 100 that provide government-subsidized housing has remained relatively unchanged at 54 percent (Chart 4-15c). In a ranking of the largest 10 providers of affordable (government-subsidized units), four of these are in the Primary Ranking of the LZ 100. See Chapter 6 (Listing 6-1) for a more comprehensive not-for-profit listing, a ranking of the largest LeadingAge-member, multi-site, affordable housing providers (including those who are not ranked on the Primary Ranking).

Managed Properties

It is not uncommon for a senior living community to be managed by an organization that does not own it. In fact, there are several companies in the senior living sector whose primary business purpose is to provide management services to properties they don't own. The LZ 100 organizations are, on the contrary, primarily property owners. The number of respondents to this area of the survey has increased significantly in past years (from 58 respondents in 2004, to 99 respondents in 2012). Approximately one third of the LZ 100 manage as well as own senior living units (Chart 4-16c), but the overwhelming portion of their portfolio of units is owned. Respondents were asked to distinguish the types of communities they managed. Approximately 32 percent of the units and 21 percent of the communities managed are memory support, nursing care or assisted living units.

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

Memory Support (MS)

This year's publication is the fifth in which the percentage of LZ 100 organizations that own and operate memory support (MS) units is analyzed. How these units are allocated within the assisted living and nursing levels of care is detailed in Charts 4-17a-c. In the 2012 LZ 100, 86 systems reported offering MS; in the 2013 LZ 100 this remained at 86 percent. As the health care field continues to refine its understanding of diseases such as Alzheimer's and other forms of dementia, the LZ 100 may further delineate changes in the allocation of units to memory support care.

Home and Community-Based Services (HCBS)

This year's survey continued to provide a much closer look at senior living providers' provision of home and community-based services. A key feature of the annual LZ 100 survey is to determine the level of home and community-based services (HCBS) offered by the LZ 100. Chart 4-18c is a snapshot of how the provision of HCBS has changed among the LZ 100 organizations that are providing services beyond their walls to the surrounding community. With 93 of the LZ 100 responding, 61 percent indicate they provide HCBS, a decrease from last year (72 percent) and the 2011 LZ 100 (73 percent). This percentage increases to 74 percent when the largest 50 are examined, another slight increase from last year (72 percent). A comparison between years (Chart 4-18d) shows that slightly more organizations (37 percent) reduced services than expanded (34 percent). Chart 4-18c shows which areas of HCBS have been the focus of these increased or decreased services.

Closer study of the data shows a correlation between age of organization and delivery of these services (Chart 4-18b). The average age of the organizations providing HCBS is approximately 81 years. This would suggest that as organizations age, they are increasingly likely to see HCBS as a way by which to extend their mission beyond their residents to the surrounding community. Organizations such as Ohio Presbyterian Retirement Services (LZ 100 #12) have grown this service area of their organizations beyond the surrounding community to even larger market areas, so that while OPRS owns approximately 3,000 senior living units, it serves well more than 95,000 seniors across the state of Ohio.

Organizations were also asked to provide total HCBS revenues for both residents and non-residents (Chart 4-9) as a percentage of overall annual revenue. HCBS services for residents (3.2 percent of revenue) is slightly above HCBS services for non-residents (2.9%). This is the opposite pattern than what was seen in last year's analysis.

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

This is the fourth year the LZ 100 has included an examination of the LZ 100 organizations' levels of participation in the Program of All-Inclusive Care for the Elderly, or PACE. The PACE program is meant to administer comprehensive medical and social services to individuals who live outside the traditional retirement community setting. This can be accomplished through adult day health centers, inpatient centers, or in the actual homes of enrollees. This is still a fairly new concept, as evidenced by the fact in Chart 4-19a that only 13 LZ 100 organizations currently provide PACE services (up 1 from 2011) to a total of nearly 2,311 enrollees (Chart 4-19b).

Small House & Green House® Models

Another emerging trend among seniors housing providers is the continued focus of resident-centered care by moving away from the traditional, institutionalized model of nursing care to more personal, homelike settings. Small houses and Green Houses® (which are a 'subset' of small houses) are designed to replicate an ordinary home that is capable of housing, typically, six to 12 elders with their own private rooms; sleeping, eating, and activity times are flexible as opposed to scheduled. The resident-centered care movement continues to grow among the LZ 100 organizations with a total of 190 small houses (an increase of 21), 40 of which are Green Houses®, in operation by 18 members of the LZ 100. (Chart 4-20b)

4-1 2013 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1a 2013 RANK, DETAILED BY UNITS (2012 VS. 2011)

| 2013 Rank | 2012 Rank | System Name | State | Summary of Not-for-profit Units | | | | | | | | Change in Total Units from 2011 to 2012 |
|-----------|-----------|---|-------|---------------------------------|--------|-------|--------|------------|--------|-------|--------|---|
| | | | | 2012 Units | | | | 2011 Units | | | | |
| | | | | Total | ILU | ALU | NCB | Total | ILU | ALU | NCB | |
| 1 | 1 | Evangelical Lutheran Good Samaritan Society | SD | 18,462 | 4,984 | 2,170 | 11,308 | 18,934 | 5,004 | 2,135 | 11,795 | -472 |
| 2 | 2 | National Senior Campuses | MD | 17,324 | 15,280 | 917 | 1,127 | 17,197 | 15,164 | 928 | 1,105 | 127 |
| 3 | 3 | ACTS Retirement-Life Communities, Inc. | PA | 8,069 | 5,759 | 877 | 1,433 | 8,130 | 5,799 | 885 | 1,446 | -61 |
| 4 | 4 | Presbyterian Homes and Services | MN | 6,582 | 3,294 | 1,940 | 1,348 | 6,342 | 3,192 | 1,773 | 1,377 | 240 |
| 5 | 5 | Covenant Retirement Communities | IL | 4,612 | 3,087 | 720 | 805 | 4,711 | 3,107 | 724 | 880 | -99 |
| 6 | 6 | Retirement Housing Foundation | CA | 4,112 | 2,639 | 878 | 595 | 4,289 | 2,639 | 1,000 | 650 | -177 |
| 7 | 7 | Lifespace Communities, Inc. | IA | 4,085 | 3,104 | 154 | 827 | 4,102 | 3,117 | 160 | 825 | -17 |
| 8 | 10 | The Kendal Corporation | PA | 3,389 | 2,508 | 433 | 448 | 3,132 | 2,264 | 381 | 487 | 257 |
| 9 | 8 | Westminster Communities of Florida | FL | 3,299 | 2,088 | 460 | 751 | 3,209 | 1,994 | 464 | 751 | 90 |
| 10 | 9 | Lutheran Senior Services | MO | 3,277 | 1,661 | 709 | 907 | 3,203 | 1,579 | 717 | 907 | 74 |
| 11 | 11 | Presbyterian Senior Living | PA | 3,176 | 1,425 | 499 | 1,252 | 3,119 | 1,368 | 499 | 1,252 | 57 |
| 12 | 14 | Ohio Presbyterian Retirement Services | OH | 3,034 | 1,723 | 515 | 796 | 2,805 | 1,540 | 507 | 758 | 229 |
| 13 | 12 | Cornerstone Affiliates | CA | 2,970 | 1,766 | 484 | 720 | 2,976 | 1,761 | 497 | 718 | -6 |
| 14 | 13 | Pacific Retirement Services, Inc. | OR | 2,824 | 2,092 | 344 | 388 | 2,878 | 2,141 | 307 | 430 | -54 |
| 15 | 15 | Asbury Communities | MD | 2,775 | 1,943 | 334 | 498 | 2,756 | 1,924 | 334 | 498 | 19 |
| 16 | 16 | Christian Homes, Inc. | IL | 2,706 | 676 | 280 | 1,750 | 2,707 | 677 | 280 | 1,750 | -1 |
| 17 | 18 | Front Porch | CA | 2,551 | 1,571 | 441 | 539 | 2,551 | 1,570 | 442 | 539 | 0 |
| 18 | 17 | Ecumen | MN | 2,545 | 288 | 1,451 | 806 | 2,609 | 286 | 1,517 | 806 | -64 |
| 19 | 21 | Volunteers of America | VA | 2,532 | 482 | 707 | 1,343 | 2,493 | 394 | 593 | 1,506 | 39 |
| 20 | 20 | Presbyterian Manors of Mid-America | KS | 2,499 | 888 | 555 | 1,056 | 2,493 | 886 | 557 | 1,050 | 6 |
| 21 | 19 | Diakon Lutheran Social Ministries | PA | 2,449 | 901 | 576 | 972 | 2,506 | 908 | 622 | 976 | -57 |
| 22 | 23 | Masonic Villages | PA | 2,325 | 1,397 | 259 | 669 | 2,306 | 1,377 | 260 | 669 | 19 |
| 23 | 27 | Shell Point | FL | 2,042 | 1,337 | 377 | 328 | 1,937 | 1,337 | 272 | 328 | 105 |
| 24 | 24 | Willow Valley Retirement Communities | PA | 1,997 | 1,501 | 219 | 277 | 2,023 | 1501 | 253 | 269 | -26 |
| 25 | 25 | Providence Life Services | IL | 1,979 | 808 | 472 | 699 | 1,979 | 808 | 472 | 699 | 0 |

4-1 2013 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1a 2013 RANK, DETAILED BY UNITS (2012 VS. 2011)

| 2013 Rank | 2012 Rank | System Name | State | Summary of Not-for-profit Units | | | | | | | | Change in Total Units from 2011 to 2012 |
|-----------|-----------|---|-------|---------------------------------|-------|-------|-------|------------|-------|-----|-------|---|
| | | | | 2012 Units | | | | 2011 Units | | | | |
| | | | | Total | ILU | ALU | NCB | Total | ILU | ALU | NCB | |
| 26 | 22 | Franciscan Communities | IL | 1,912 | 751 | 385 | 776 | 2,407 | 1,080 | 485 | 842 | -495 |
| 27 | 26 | Augustana Care Corporation | MN | 1,896 | 80 | 1,035 | 781 | 1,951 | 135 | 998 | 818 | -55 |
| 28 | 30 | Otterbein Senior Lifestyle Choices | OH | 1,797 | 744 | 350 | 703 | 1,692 | 716 | 327 | 649 | 105 |
| 29 | 28 | Christian Care Companies | AZ | 1,786 | 1,434 | 284 | 68 | 1,787 | 1,434 | 285 | 68 | -1 |
| 30 | 46 | Concordia Lutheran Ministries | PA | 1,745 | 554 | 901 | 290 | 1,400 | 453 | 705 | 242 | 345 |
| 31 | 38 | National Church Residences | OH | 1,691 | 705 | 446 | 540 | 1,542 | 706 | 373 | 463 | 149 |
| 32 | 54 | The Eddy | NY | 1,673 | 502 | 313 | 858 | 1,230 | 499 | 313 | 418 | 443 |
| 33 | 29 | Elim Care | MN | 1,638 | 190 | 441 | 1,007 | 1,719 | 264 | 440 | 1,015 | -81 |
| 34 | 35 | Homewood Retirement Centers | MD | 1,631 | 907 | 273 | 451 | 1,590 | 866 | 273 | 451 | 41 |
| 35 | 31 | Springpoint Senior Living | NJ | 1,601 | 1,180 | 164 | 257 | 1,691 | 1,245 | 179 | 267 | -90 |
| 36 | 33 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 1,601 | 259 | 628 | 714 | 1,601 | 259 | 628 | 714 | 0 |
| 37 | 34 | Hebrew SeniorLife | MA | 1,593 | 660 | 119 | 814 | 1,593 | 660 | 119 | 814 | 0 |
| 38 | 36 | Senior Quality Lifestyles Corporation | TX | 1,587 | 989 | 337 | 261 | 1,587 | 989 | 337 | 261 | 0 |
| 39 | 37 | Eskaton | CA | 1,564 | 530 | 608 | 426 | 1,549 | 515 | 608 | 426 | 15 |
| 40 | 39 | Bethesda Health Group, Inc. | MO | 1,522 | 627 | 34 | 861 | 1,522 | 627 | 34 | 861 | 0 |
| 41 | 40 | Episcopal Senior Communities | CA | 1,505 | 1,024 | 105 | 376 | 1,505 | 1,033 | 96 | 376 | 0 |
| 42 | ** NR | Magnolia Manor, Inc.* | GA | 1,483 | 339 | 335 | 809 | 1,483 | 339 | 335 | 809 | 0 |
| 43 | 32 | be.group | CA | 1,473 | 851 | 390 | 232 | 1,615 | 954 | 429 | 232 | -142 |
| 44 | 42 | Buckner Retirement Services, Inc. | TX | 1,471 | 870 | 315 | 286 | 1,481 | 884 | 315 | 282 | -10 |
| 45 | 44 | Greencroft | IN | 1,451 | 530 | 388 | 533 | 1,449 | 528 | 388 | 533 | 2 |
| 46 | 43 | Presbyterian Homes | IL | 1,446 | 859 | 224 | 363 | 1,475 | 862 | 231 | 382 | -29 |
| 47 | 41 | Holland Home | MI | 1,419 | 723 | 435 | 261 | 1,485 | 723 | 501 | 261 | -66 |
| 48 | 45 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 1,410 | 60 | 135 | 1,215 | 1,410 | 60 | 135 | 1,215 | 0 |
| 49 | 47 | Mississippi Methodist Senior Services | MS | 1,390 | 805 | 265 | 320 | 1,390 | 805 | 265 | 320 | 0 |
| 50 | 48 | WesleyLife | IA | 1,330 | 695 | 261 | 374 | 1,330 | 695 | 261 | 374 | 0 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

4-1 2013 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1a 2013 RANK, DETAILED BY UNITS (2012 VS. 2011)

| 2013 Rank | 2012 Rank | System Name | State | Summary of Not-for-profit Units | | | | | | | | Change in Total Units from 2011 to 2012 |
|-----------|-----------|--|-------|---------------------------------|-----|-------|-----|------------|-----|-------|-----|---|
| | | | | 2012 Units | | | | 2011 Units | | | | |
| | | | | Total | ILU | ALU | NCB | Total | ILU | ALU | NCB | |
| 51 | 53 | Baptist Village Retirement Communities of Oklahoma | OK | 1,276 | 770 | 181 | 325 | 1,262 | 766 | 171 | 325 | 14 |
| 52 | 51 | Lutheran Services for the Aging | NC | 1,274 | 257 | 285 | 732 | 1,270 | 257 | 281 | 732 | 4 |
| 53 | 52 | Masonicare | CT | 1,266 | 458 | 272 | 536 | 1,266 | 458 | 272 | 536 | 0 |
| 54 | 50 | Lutheran Life Communities | IL | 1,256 | 233 | 283 | 740 | 1,273 | 243 | 283 | 747 | -17 |
| 55 | 55 | Bethesda Senior Living Communities | CO | 1,250 | 204 | 1,046 | 0 | 1,221 | 204 | 1,017 | 0 | 29 |
| 56 | ** NR | Friendship Senior Options | IL | 1,239 | 806 | 185 | 248 | 1,039 | 659 | 106 | 205 | 200 |
| 57 | 57 | Phoebe Ministries | PA | 1,218 | 380 | 171 | 667 | 1,215 | 406 | 146 | 663 | 3 |
| 58 | 56 | Virginia Baptist Homes | VA | 1,211 | 764 | 227 | 220 | 1,217 | 770 | 227 | 220 | -6 |
| 59 | 58 | Virginia United Methodist Homes, Inc. | VA | 1,209 | 628 | 324 | 257 | 1,212 | 627 | 328 | 257 | -3 |
| 60 | 59 | American Baptist Homes of the Midwest | MN | 1,200 | 374 | 209 | 617 | 1,200 | 374 | 209 | 617 | 0 |
| 61 | 60 | Lutheran SeniorLife | PA | 1,158 | 373 | 327 | 458 | 1,197 | 412 | 327 | 458 | -39 |
| 62 | 61 | EMA, Inc. | MD | 1,156 | 651 | 228 | 277 | 1,157 | 652 | 228 | 277 | -1 |
| 63 | 62 | Lutheran Social Services of South Central Pennsylvania | PA | 1,150 | 555 | 251 | 344 | 1,150 | 555 | 251 | 344 | 0 |
| 64 | 63 | Sears Methodist Retirement System, Inc. | TX | 1,097 | 529 | 136 | 432 | 1,135 | 531 | 138 | 466 | -38 |
| 65 | ** NR | Los Angeles Jewish Home for the Aged | CA | 1,092 | 159 | 423 | 510 | 1,092 | 159 | 423 | 510 | 0 |
| 66 | 65 | Northern California Presbyterian Homes and Services | CA | 1,089 | 826 | 122 | 141 | 1,085 | 840 | 104 | 141 | 4 |
| 67 | 66 | Presbyterian SeniorCare | PA | 1,065 | 359 | 285 | 421 | 1,065 | 359 | 285 | 421 | 0 |
| 68 | 67 | United Methodist Homes | NY | 1,059 | 395 | 238 | 426 | 1,059 | 395 | 238 | 426 | 0 |
| 69 | 68 | Presbyterian Villages of Michigan | MI | 1,052 | 588 | 286 | 178 | 1,043 | 564 | 301 | 178 | 9 |
| 70 | 69 | Lutheran Homes of South Carolina | SC | 1,038 | 386 | 328 | 324 | 1,038 | 386 | 328 | 324 | 0 |
| 71 | 70 | Walker Methodist | MN | 1,034 | 493 | 165 | 376 | 1,034 | 493 | 165 | 376 | 0 |
| 72 | 71 | United Methodist Homes of New Jersey | NJ | 1,028 | 88 | 688 | 252 | 1,028 | 88 | 688 | 252 | 0 |
| 73 | 72 | Wesley Enhanced Living | PA | 1,016 | 502 | 214 | 300 | 1,019 | 501 | 218 | 300 | -3 |
| 74 | 64 | Air Force Villages | TX | 1,013 | 748 | 129 | 136 | 1,103 | 755 | 180 | 168 | -90 |
| 75 | 74 | Elant | NY | 995 | 148 | 144 | 703 | 999 | 148 | 148 | 703 | -4 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

4-1 2013 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1a 2013 RANK, DETAILED BY UNITS (2012 VS. 2011)

| 2013 Rank | 2012 Rank | System Name | State | Summary of Not-for-profit Units | | | | | | | | Change in Total Units from 2011 to 2012 |
|--------------------|-----------|--|-------|---------------------------------|----------------|---------------|---------------|----------------|----------------|---------------|---------------|---|
| | | | | 2012 Units | | | | 2011 Units | | | | |
| | | | | Total | ILU | ALU | NCB | Total | ILU | ALU | NCB | |
| 76 | 75 | United Church Homes | OH | 977 | 177 | 136 | 664 | 992 | 158 | 160 | 674 | -15 |
| 77 | 49 | SantaFe Senior Living | FL | 976 | 731 | 185 | 60 | 1,276 | 940 | 276 | 60 | -300 |
| 78 | 78 | The Presbyterian Homes, Inc. of North Carolina | NC | 956 | 634 | 133 | 189 | 956 | 634 | 133 | 189 | 0 |
| 79 | 77 | Presby's Inspired Life | PA | 947 | 469 | 218 | 260 | 959 | 477 | 222 | 260 | -12 |
| 80 | 79 | United Church Homes & Services | NC | 944 | 526 | 90 | 328 | 939 | 520 | 91 | 328 | 5 |
| 81 | 80 | United Methodist Retirement Homes, Inc. | NC | 937 | 630 | 101 | 206 | 937 | 630 | 101 | 206 | 0 |
| 82 | 76 | Menno Haven | PA | 920 | 531 | 177 | 212 | 959 | 569 | 177 | 213 | -39 |
| 83 | 85 | United Methodist Memorial Home | IN | 917 | 189 | 469 | 259 | 909 | 181 | 469 | 259 | 8 |
| 84 | 86 | Mather LifeWays | IL | 900 | 623 | 46 | 231 | 899 | 622 | 46 | 231 | 1 |
| 85 | 73 | VMP | WI | 889 | 447 | 205 | 237 | 1,016 | 574 | 205 | 237 | -127 |
| 86 | 87 | Oakwood Lutheran Senior Ministries | WI | 885 | 588 | 160 | 137 | 890 | 593 | 160 | 137 | -5 |
| 87 | 88 | Cedar Community | WI | 881 | 431 | 203 | 247 | 881 | 431 | 203 | 247 | 0 |
| 88 | 84 | Christian Care Centers | TX | 879 | 402 | 137 | 340 | 909 | 402 | 137 | 370 | -30 |
| 89 | ** NR | Westminster Ingleside Retirement Communities | DC | 878 | 608 | 124 | 146 | 878 | 608 | 124 | 146 | 0 |
| 90 | 89 | Presbyterian Communities and Services | TX | 864 | 334 | 139 | 391 | 864 | 334 | 139 | 391 | 0 |
| 91 | 83 | St. Ann's Community | NY | 863 | 246 | 75 | 542 | 912 | 246 | 75 | 591 | -49 |
| 92 | 90 | Simpson Senior Services | PA | 858 | 494 | 172 | 192 | 858 | 494 | 172 | 192 | 0 |
| 93 | 93 | Living Branches | PA | 852 | 463 | 246 | 143 | 843 | 464 | 246 | 133 | 9 |
| 94 | 91 | Presbyterian Communities of South Carolina | SC | 848 | 292 | 290 | 266 | 854 | 294 | 294 | 266 | -6 |
| 95 | 95 | LutherCare | PA | 840 | 483 | 128 | 229 | 812 | 473 | 128 | 211 | 28 |
| 96 | 92 | Goodwin House Incorporated | VA | 838 | 590 | 99 | 149 | 845 | 597 | 99 | 149 | -7 |
| 97 | ** NR | Givens Estates Retirement Community | NC | 820 | 599 | 91 | 130 | 516 | 385 | 61 | 70 | 304 |
| 98 | 96 | Elder Care Alliance | CA | 803 | 39 | 657 | 107 | 803 | 39 | 657 | 107 | 0 |
| 99 | 100 | Western Home Communities | IA | 793 | 463 | 230 | 100 | 782 | 452 | 230 | 100 | 5 |
| 100 | 98 | Morningside Ministries | TX | 793 | 321 | 136 | 336 | 788 | 311 | 141 | 336 | 5 |
| Total Units | | | | 201,729 | 103,054 | 37,736 | 60,939 | 201,527 | 102,698 | 37,477 | 61,313 | 196 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

4-1 2013 LeadingAge Ziegler 100

Analysis of the Data: Units

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

| Largest | ILU | ALU | NCB | Total Units | % as total of LZ 100 units |
|---------|---------|--------|--------|-------------|----------------------------|
| 10 | 44,404 | 9,258 | 19,549 | 73,211 | 36% |
| 25 | 63,202 | 16,771 | 31,642 | 107,639 | 55% |
| 50 | 80,070 | 25,942 | 45,218 | 148,510 | 75% |
| 100 | 103,054 | 37,736 | 60,939 | 201,729 | 100% |

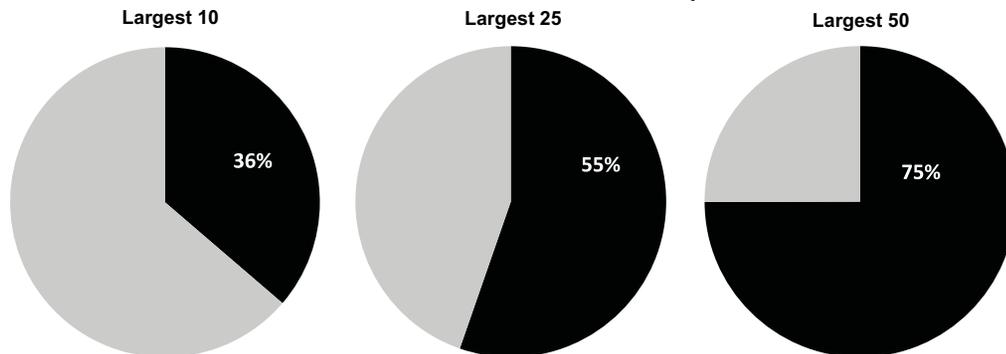
Analysis of Unit Mix for Each Year's Respective LZ 100 Listing

| 2011 LZ 100 | | | | |
|-----------------------|---------|-------|-------|---------|
| 2010 avg units/system | 1,002.7 | 360.0 | 627.3 | 1,989.9 |
| % of total | 50.4% | 18.1% | 31.5% | 100.0% |
| 2012 LZ 100 | | | | |
| 2011 avg units/system | 1,024.2 | 371.2 | 612.2 | 2,007.5 |
| % of total | 51.0% | 18.5% | 30.5% | 100.0% |
| 2013 LZ 100 | | | | |
| 2012 avg units/system | 1,016.6 | 368.7 | 618.4 | 2,003.7 |
| % of total | 50.7% | 18.4% | 30.9% | 100.0% |

Analysis of Unit Mix for 2013 LZ 100

| | | | | |
|-----------------------|---------|-------|-------|---------|
| 2010 avg units/system | 1,006.3 | 340.7 | 640.6 | 1,987.6 |
| % of total | 50.6% | 17.1% | 32.2% | 100.0% |
| 2011 avg units/system | 1,002.7 | 360.0 | 627.3 | 1,989.9 |
| % of total | 50.4% | 18.1% | 31.5% | 100.0% |
| 2012 avg units/system | 1,030.5 | 377.4 | 609.4 | 2,017.3 |
| % of total | 51.1% | 18.7% | 30.2% | 100.0% |

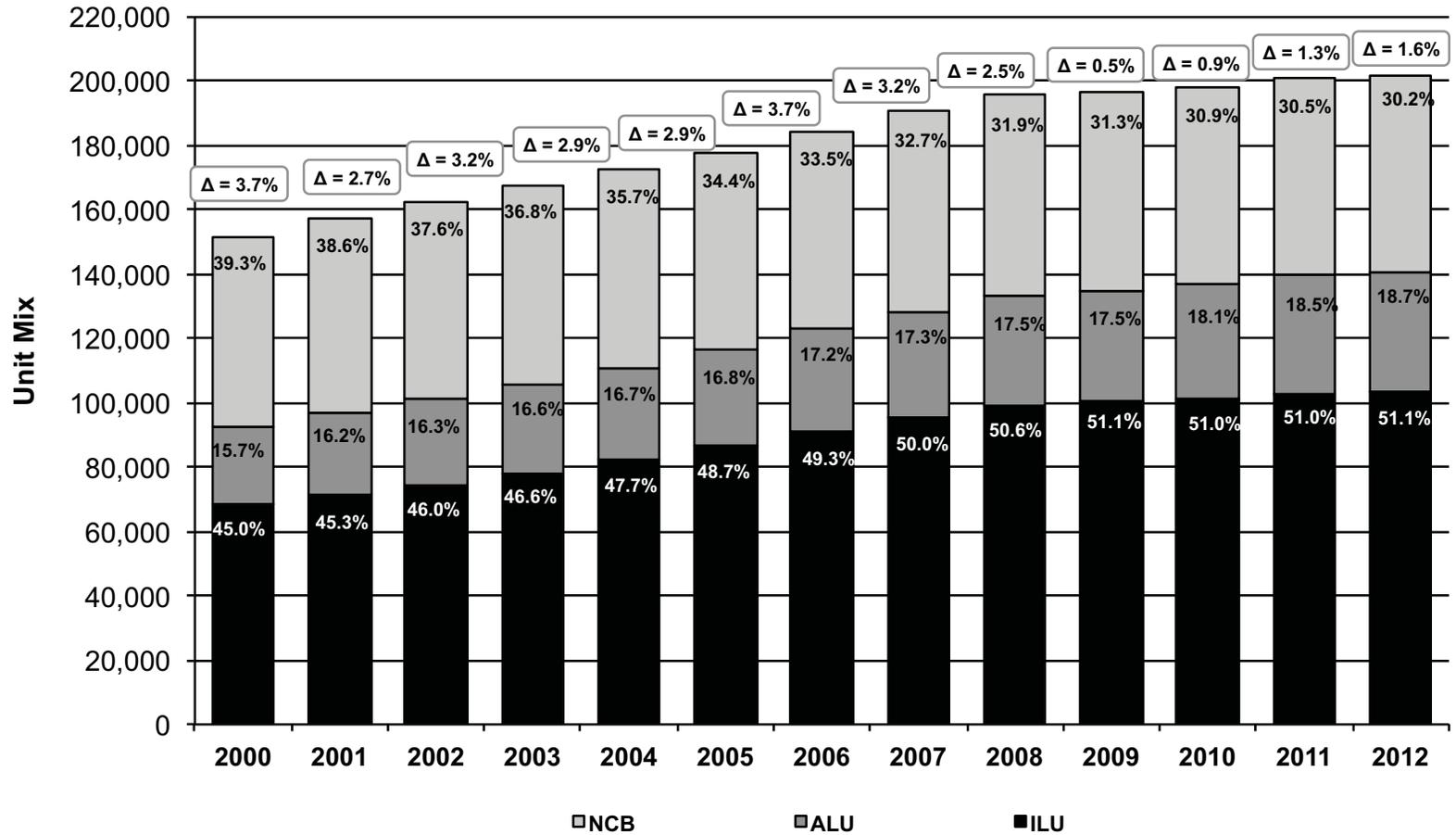
4-1c PERCENTAGE OF TOTAL UNITS OWNED (BY LARGEST 10, 25 & 50)



4-1 2013 LeadingAge Ziegler 100

Analysis of the Data: Units

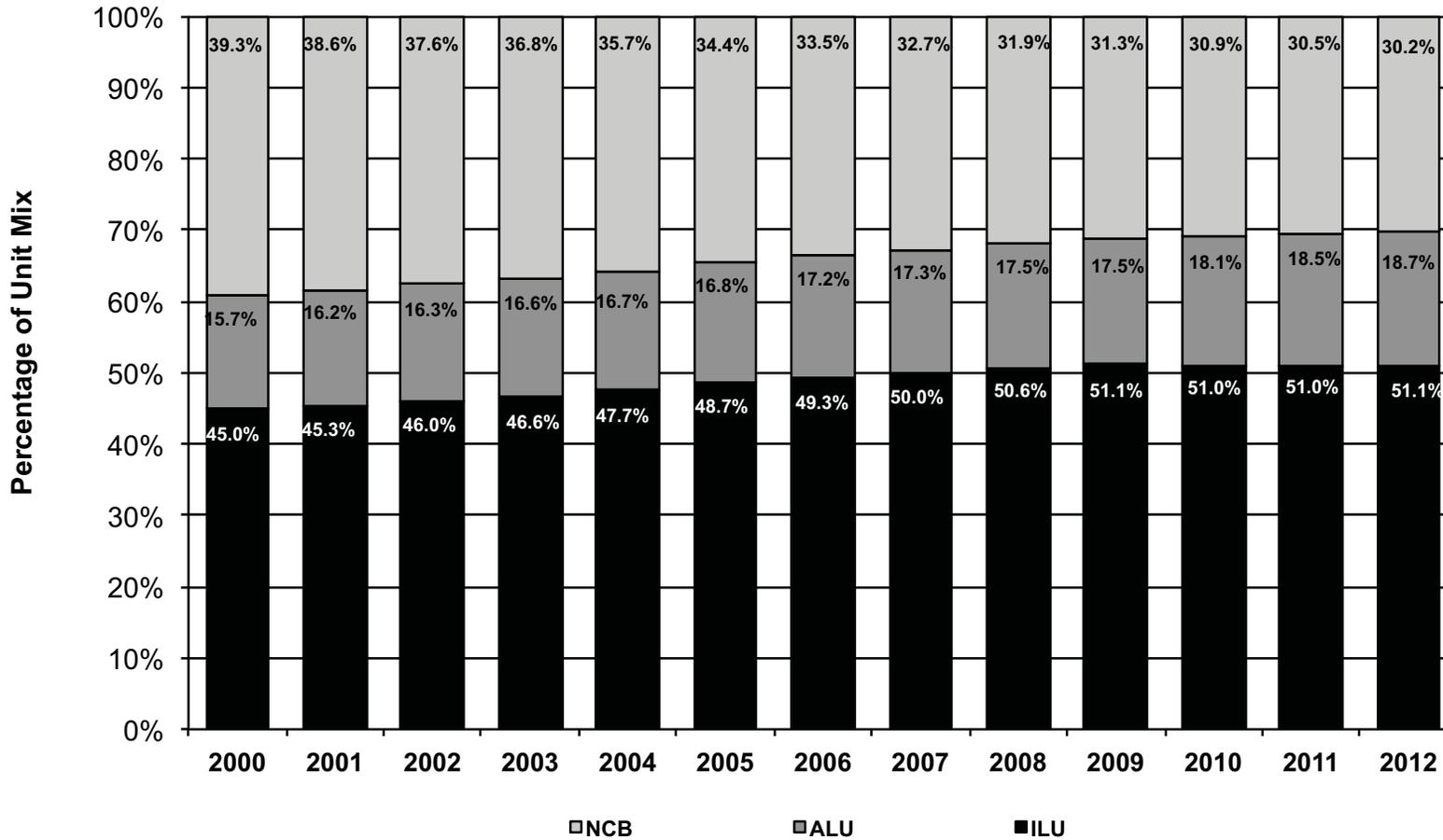
4-1d TOTAL UNIT MIX BY YEAR, BY TOTAL UNITS, 2000 THROUGH 2012, FOR 2013 LZ 100



4-1 2013 LeadingAge Ziegler 100

Analysis of the Data: Units

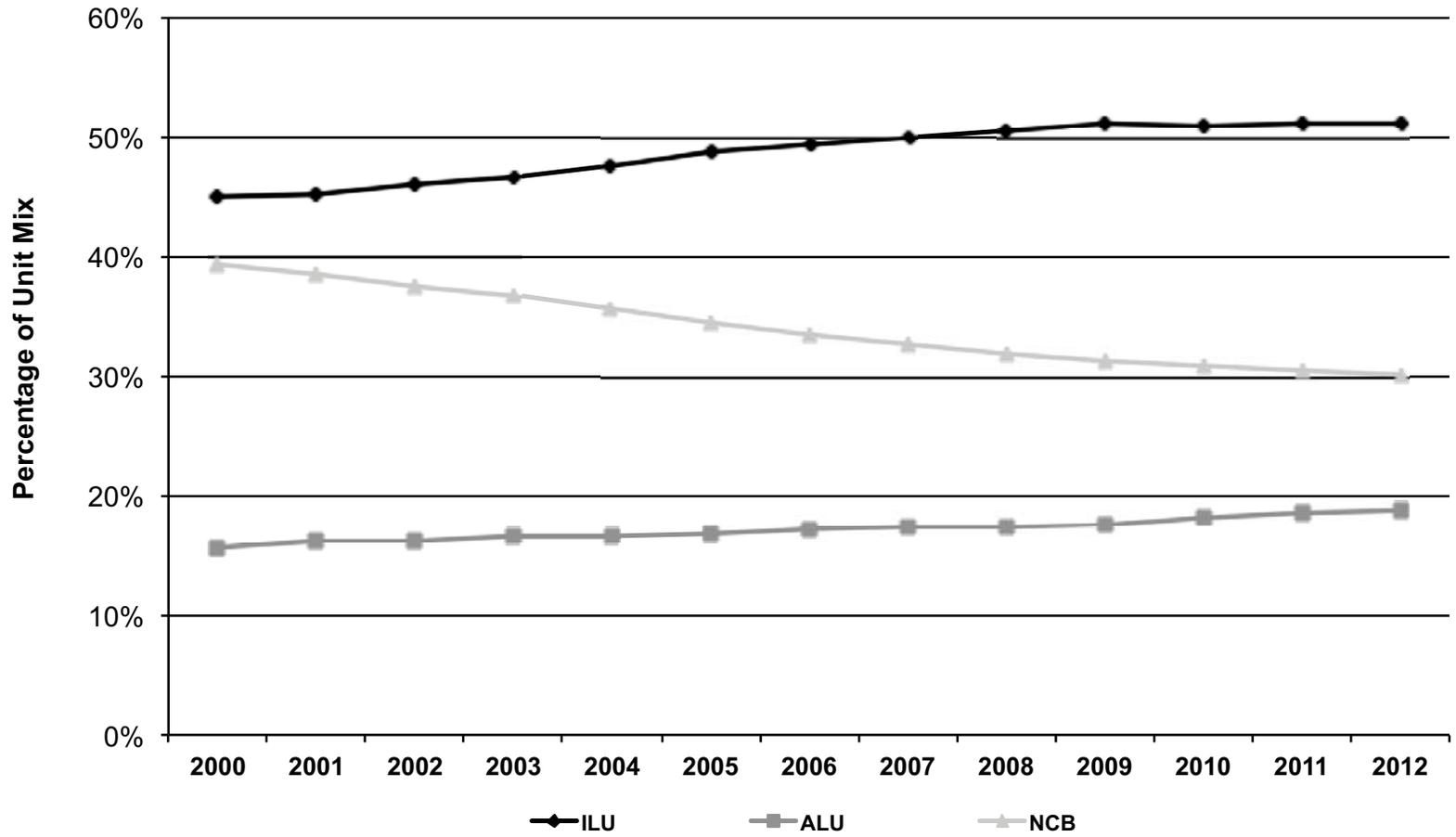
4-1e TOTAL UNIT MIX BY YEAR, BY PERCENT, 2000 THROUGH 2012, FOR 2013 LZ 100



4-1 2013 LeadingAge Ziegler 100

Analysis of the Data: Units

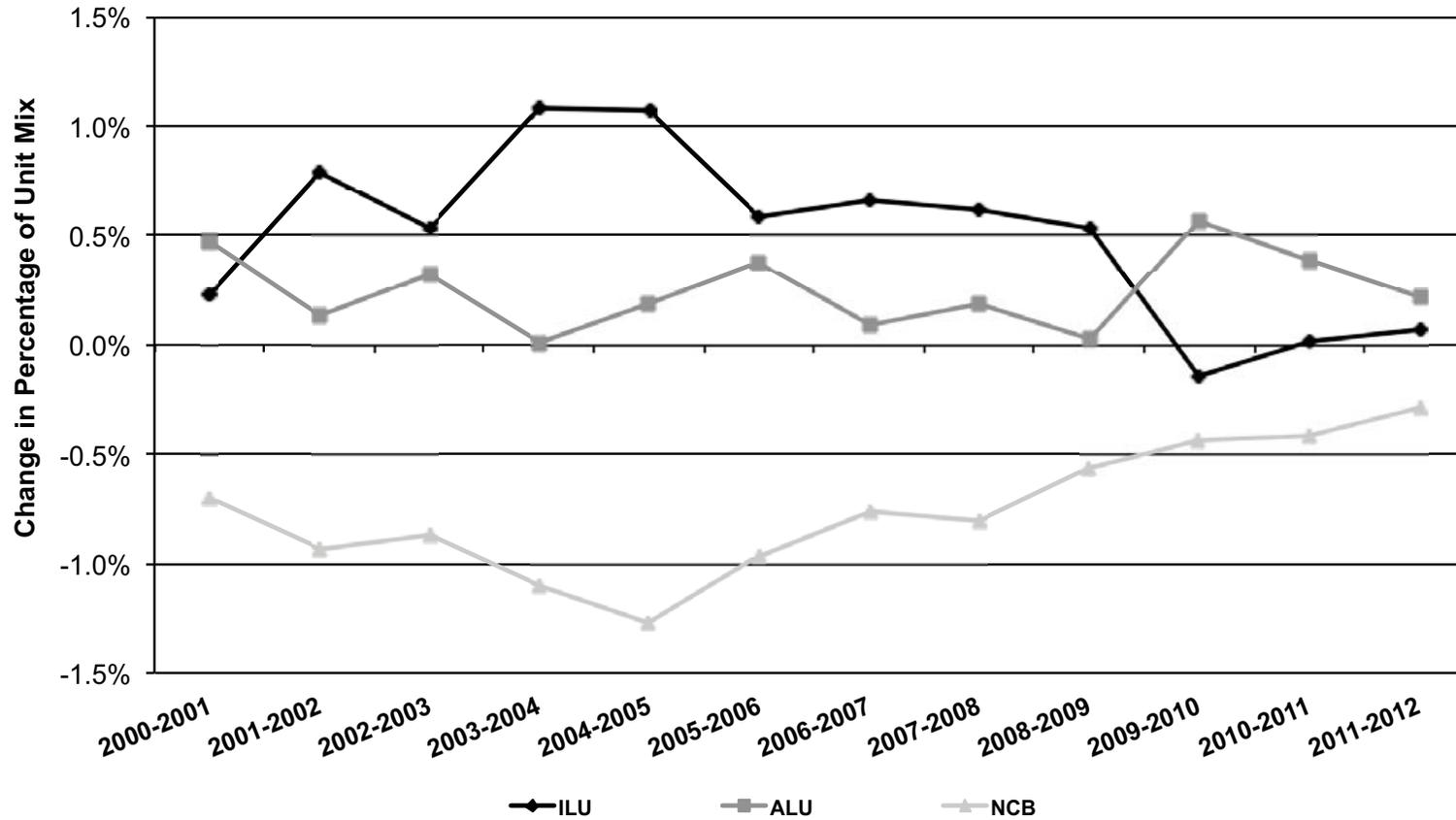
4-1f YEAR OVER YEAR CHANGE IN PERCENTAGE OF UNIT MIX, 2000 THROUGH 2012, FOR 2013 LZ 100



4-1 2013 LeadingAge Ziegler 100

Analysis of the Data: Units

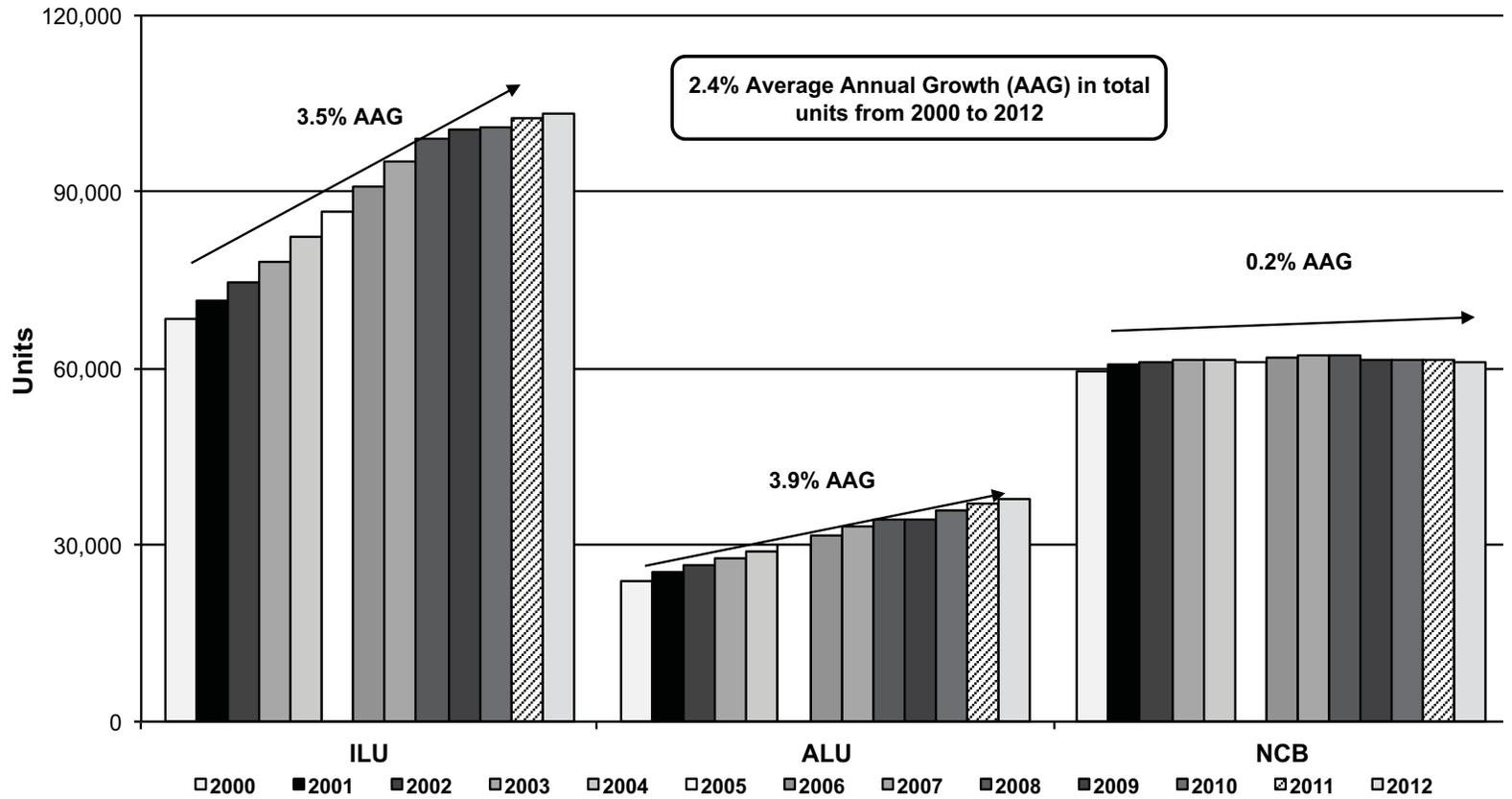
4-1g UNIT TYPE COMPARISON, BY UNITS, 2000 THROUGH 2012, FOR 2013 LZ 100



4-1 2013 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1h UNIT TYPE COMPARISON, BY UNITS, 2000 THROUGH 2012, FOR 2013 LZ 100



4-2 2013 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2a 2013 RANK, DETAILED BY COMMUNITIES (2012 VS. 2011)

| 2013 Rank | 2012 Rank | System Name | State | Summary of Not-for-profit Communities | | | | | | | | | | Change in Total Communities from 2011 to 2012 |
|-----------|-----------|---|-------|---------------------------------------|------|----|----|----|------------------|------|----|----|----|---|
| | | | | 2012 Communities | | | | | 2011 Communities | | | | | |
| | | | | Total | CCRC | IL | AL | NH | Total | CCRC | IL | AL | NH | |
| 1 | 1 | Evangelical Lutheran Good Samaritan Society | SD | 180 | 78 | 9 | 36 | 57 | 184 | 78 | 9 | 37 | 60 | -4 |
| 2 | 2 | National Senior Campuses | MD | 15 | 15 | 0 | 0 | 0 | 15 | 15 | 0 | 0 | 0 | 0 |
| 3 | 3 | ACTS Retirement-Life Communities, Inc. | PA | 23 | 23 | 0 | 0 | 0 | 23 | 23 | 0 | 0 | 0 | 0 |
| 4 | 4 | Presbyterian Homes and Services | MN | 39 | 13 | 21 | 3 | 2 | 36 | 11 | 21 | 2 | 2 | 3 |
| 5 | 5 | Covenant Retirement Communities | IL | 14 | 12 | 1 | 1 | 0 | 15 | 12 | 1 | 2 | 0 | -1 |
| 6 | 6 | Retirement Housing Foundation | CA | 18 | 9 | 8 | 1 | 0 | 19 | 9 | 8 | 2 | 0 | -1 |
| 7 | 7 | Lifespace Communities, Inc. | IA | 12 | 12 | 0 | 0 | 0 | 12 | 12 | 0 | 0 | 0 | 0 |
| 8 | 10 | The Kendal Corporation | PA | 15 | 13 | 2 | 0 | 0 | 14 | 12 | 2 | 0 | 0 | 1 |
| 9 | 8 | Westminster Communities of Florida | FL | 10 | 8 | 2 | 0 | 0 | 10 | 8 | 2 | 0 | 0 | 0 |
| 10 | 9 | Lutheran Senior Services | MO | 11 | 9 | 0 | 1 | 1 | 11 | 9 | 0 | 1 | 1 | 0 |
| 11 | 11 | Presbyterian Senior Living | PA | 20 | 12 | 5 | 2 | 1 | 20 | 12 | 5 | 2 | 1 | 0 |
| 12 | 14 | Ohio Presbyterian Retirement Services | OH | 11 | 9 | 2 | 0 | 0 | 11 | 8 | 2 | 0 | 0 | 0 |
| 13 | 12 | Cornerstone Affiliates | CA | 11 | 11 | 0 | 0 | 0 | 11 | 11 | 0 | 0 | 0 | 0 |
| 14 | 13 | Pacific Retirement Services, Inc. | OR | 9 | 8 | 1 | 0 | 0 | 9 | 8 | 1 | 0 | 0 | 0 |
| 15 | 15 | Asbury Communities | MD | 5 | 5 | 0 | 0 | 0 | 5 | 5 | 0 | 0 | 0 | 0 |
| 16 | 16 | Christian Homes, Inc. | IL | 14 | 13 | 0 | 0 | 1 | 14 | 13 | 0 | 0 | 1 | 0 |
| 17 | 18 | Front Porch | CA | 10 | 8 | 2 | 0 | 0 | 10 | 8 | 2 | 0 | 0 | 0 |
| 18 | 17 | Ecumen | MN | 40 | 0 | 4 | 27 | 9 | 40 | 0 | 4 | 27 | 9 | 0 |
| 19 | 21 | Volunteers of America | VA | 25 | 5 | 2 | 8 | 10 | 24 | 3 | 2 | 7 | 12 | 1 |
| 20 | 20 | Presbyterian Manors of Mid-America | KS | 18 | 16 | 0 | 1 | 1 | 18 | 16 | 0 | 1 | 1 | 0 |
| 21 | 19 | Diakon Lutheran Social Ministries | PA | 11 | 8 | 0 | 3 | 0 | 11 | 8 | 0 | 3 | 0 | 0 |
| 22 | 23 | Masonic Villages | PA | 5 | 3 | 1 | 1 | 0 | 5 | 3 | 1 | 1 | 0 | 0 |
| 23 | 27 | Shell Point | FL | 2 | 2 | 0 | 0 | 0 | 2 | 2 | 0 | 0 | 0 | 0 |
| 24 | 24 | Willow Valley Retirement Communities | PA | 3 | 3 | 0 | 0 | 0 | 3 | 3 | 0 | 0 | 0 | 0 |
| 25 | 25 | Providence Life Services | IL | 11 | 1 | 5 | 1 | 4 | 11 | 1 | 5 | 1 | 4 | 0 |

4-2 2013 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2a 2013 RANK, DETAILED BY COMMUNITIES (2012 VS. 2011)

| 2013 Rank | 2012 Rank | System Name | State | Summary of Not-for-profit Communities | | | | | | | | | | Change in Total Communities from 2011 to 2012 |
|-----------|-----------|---|-------|---------------------------------------|------|----|----|----|------------------|------|----|----|----|---|
| | | | | 2012 Communities | | | | | 2011 Communities | | | | | |
| | | | | Total | CCRC | IL | AL | NH | Total | CCRC | IL | AL | NH | |
| 26 | 22 | Franciscan Communities | IL | 8 | 4 | 1 | 3 | 0 | 10 | 6 | 1 | 3 | 0 | -2 |
| 27 | 26 | Augustana Care Corporation | MN | 18 | 0 | 6 | 6 | 6 | 18 | 0 | 6 | 6 | 6 | 0 |
| 28 | 30 | Otterbein Senior Lifestyle Choices | OH | 10 | 5 | 0 | 0 | 5 | 10 | 5 | 0 | 0 | 5 | 0 |
| 29 | 28 | Christian Care Companies | AZ | 4 | 1 | 3 | 0 | 0 | 4 | 1 | 3 | 0 | 0 | 0 |
| 30 | 46 | Concordia Lutheran Ministries | PA | 10 | 3 | 0 | 7 | 0 | 8 | 2 | 0 | 6 | 0 | 2 |
| 31 | 38 | National Church Residences | OH | 7 | 4 | 0 | 2 | 1 | 7 | 4 | 0 | 2 | 1 | 0 |
| 32 | 54 | The Eddy | NY | 11 | 5 | 0 | 1 | 5 | 8 | 5 | 0 | 1 | 2 | 3 |
| 33 | 29 | Elim Care | MN | 19 | 1 | 2 | 7 | 9 | 19 | 1 | 2 | 7 | 9 | 0 |
| 34 | 35 | Homewood Retirement Centers | MD | 6 | 6 | 0 | 0 | 0 | 6 | 6 | 0 | 0 | 0 | 0 |
| 35 | 31 | Springpoint Senior Living | NJ | 5 | 5 | 0 | 0 | 0 | 5 | 5 | 0 | 0 | 0 | 0 |
| 36 | 33 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 8 | 1 | 2 | 4 | 1 | 8 | 1 | 2 | 4 | 1 | 0 |
| 37 | 34 | Hebrew SeniorLife | MA | 4 | 2 | 1 | 0 | 1 | 4 | 2 | 1 | 0 | 1 | 0 |
| 38 | 36 | Senior Quality Lifestyles Corporation | TX | 5 | 5 | 0 | 0 | 0 | 5 | 5 | 0 | 0 | 0 | 0 |
| 39 | 37 | Eskaton | CA | 13 | 1 | 3 | 6 | 3 | 13 | 1 | 3 | 6 | 3 | 0 |
| 40 | 39 | Bethesda Health Group, Inc.* | MO | 8 | 2 | 4 | 0 | 2 | 8 | 2 | 4 | 0 | 2 | 0 |
| 41 | 40 | Episcopal Senior Communities | CA | 7 | 6 | 0 | 0 | 1 | 7 | 6 | 0 | 0 | 1 | 0 |
| 42 | **NR | Magnolia Manor, Inc.* | GA | 8 | 2 | 4 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 8 |
| 43 | 32 | be.group | CA | 9 | 6 | 0 | 3 | 0 | 10 | 6 | 1 | 3 | 0 | -1 |
| 44 | 42 | Buckner Retirement Services, Inc. | TX | 7 | 5 | 2 | 0 | 0 | 7 | 5 | 2 | 0 | 0 | 0 |
| 45 | 44 | Greencroft | IN | 6 | 6 | 0 | 0 | 0 | 6 | 6 | 0 | 0 | 0 | 0 |
| 46 | 43 | Presbyterian Homes | IL | 4 | 4 | 0 | 0 | 0 | 4 | 4 | 0 | 0 | 0 | 0 |
| 47 | 41 | Holland Home | MI | 4 | 2 | 0 | 1 | 1 | 4 | 2 | 0 | 1 | 1 | 0 |
| 48 | 45 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 6 | 2 | 0 | 0 | 4 | 6 | 2 | 0 | 0 | 4 | 0 |
| 49 | 47 | Mississippi Methodist Senior Services | MS | 11 | 2 | 7 | 0 | 2 | 11 | 2 | 7 | 0 | 2 | 0 |
| 50 | 48 | WesleyLife | IA | 7 | 7 | 0 | 0 | 0 | 7 | 7 | 0 | 0 | 0 | 0 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

4-2 2013 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2a 2013 RANK, DETAILED BY COMMUNITIES (2012 VS. 2011)

| 2013 Rank | 2012 Rank | System Name | State | Summary of Not-for-profit Communities | | | | | | | | | | Change in Total Communities from 2011 to 2012 |
|-----------|-----------|--|-------|---------------------------------------|------|----|----|----|------------------|------|----|----|----|---|
| | | | | 2012 Communities | | | | | 2011 Communities | | | | | |
| | | | | Total | CCRC | IL | AL | NH | Total | CCRC | IL | AL | NH | |
| 51 | 53 | Baptist Village Retirement Communities of Oklahoma | OK | 8 | 3 | 5 | 0 | 0 | 8 | 3 | 5 | 0 | 0 | 0 |
| 52 | 51 | Lutheran Services for the Aging | NC | 8 | 1 | 1 | 1 | 5 | 8 | 1 | 1 | 1 | 5 | 0 |
| 53 | 52 | Masonicare | CT | 5 | 1 | 1 | 1 | 2 | 5 | 1 | 1 | 1 | 2 | 0 |
| 54 | 50 | Lutheran Life Communities | IL | 5 | 3 | 0 | 2 | 0 | 5 | 3 | 0 | 2 | 0 | 0 |
| 55 | 55 | Bethesda Senior Living Communities | CO | 14 | 0 | 3 | 11 | 0 | 14 | 0 | 3 | 11 | 0 | 0 |
| 56 | **NR | Friendship Senior Options | IL | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| 57 | 57 | Phoebe Ministries | PA | 4 | 3 | 0 | 0 | 1 | 4 | 3 | 0 | 0 | 1 | 0 |
| 58 | 56 | Virginia Baptist Homes | VA | 4 | 4 | 0 | 0 | 0 | 4 | 4 | 0 | 0 | 0 | 0 |
| 59 | 58 | Virginia United Methodist Homes, Inc. | VA | 7 | 6 | 0 | 1 | 0 | 7 | 6 | 0 | 1 | 0 | 0 |
| 60 | 59 | American Baptist Homes of the Midwest* | MN | 8 | 4 | 1 | 2 | 1 | 8 | 4 | 1 | 2 | 1 | 0 |
| 61 | 60 | Lutheran SeniorLife | PA | 7 | 2 | 5 | 0 | 0 | 7 | 2 | 5 | 0 | 0 | 0 |
| 62 | 61 | EMA, Inc. | MD | 4 | 3 | 0 | 1 | 0 | 4 | 3 | 0 | 1 | 0 | 0 |
| 63 | 62 | Lutheran Social Services of South Central Pennsylvania | PA | 6 | 6 | 0 | 0 | 0 | 6 | 6 | 0 | 0 | 0 | 0 |
| 64 | 63 | Sears Methodist Retirement System, Inc. | TX | 6 | 5 | 0 | 0 | 1 | 6 | 5 | 0 | 0 | 1 | 0 |
| 65 | **NR | Los Angeles Jewish Home for the Aged* | CA | 3 | 1 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 |
| 66 | 65 | Northern California Presbyterian Homes and Services | CA | 4 | 3 | 1 | 0 | 0 | 4 | 3 | 1 | 0 | 0 | 0 |
| 67 | 66 | Presbyterian SeniorCare | PA | 3 | 3 | 0 | 0 | 0 | 3 | 3 | 0 | 0 | 0 | 0 |
| 68 | 67 | United Methodist Homes* | NY | 4 | 3 | 0 | 1 | 0 | 4 | 3 | 0 | 1 | 0 | 0 |
| 69 | 68 | Presbyterian Villages of Michigan | MI | 8 | 2 | 6 | 0 | 0 | 8 | 2 | 6 | 0 | 0 | 0 |
| 70 | 69 | Lutheran Homes of South Carolina | SC | 5 | 5 | 0 | 0 | 0 | 5 | 5 | 0 | 0 | 0 | 0 |
| 71 | 70 | Walker Methodist | MN | 6 | 1 | 4 | 1 | 0 | 6 | 1 | 4 | 1 | 0 | 0 |
| 72 | 71 | United Methodist Homes of New Jersey | NJ | 5 | 1 | 0 | 4 | 0 | 5 | 1 | 0 | 4 | 0 | 0 |
| 73 | 72 | Wesley Enhanced Living | PA | 6 | 5 | 0 | 1 | 0 | 6 | 5 | 0 | 1 | 0 | 0 |
| 74 | 64 | Air Force Villages | TX | 3 | 2 | 0 | 1 | 0 | 3 | 2 | 0 | 1 | 0 | 0 |
| 75 | 74 | Elant | NY | 6 | 1 | 0 | 1 | 4 | 6 | 1 | 0 | 1 | 4 | 0 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

4-2 2013 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2a 2013 RANK, DETAILED BY COMMUNITIES (2012 VS. 2011)

| 2013 Rank | 2012 Rank | System Name | State | Summary of Not-for-profit Communities | | | | | | | | | | Change in Total Communities from 2011 to 2012 |
|--------------------------|-----------|--|-------|---------------------------------------|------------|------------|------------|------------|------------------|------------|------------|------------|------------|---|
| | | | | 2012 Communities | | | | | 2011 Communities | | | | | |
| | | | | Total | CCRC | IL | AL | NH | Total | CCRC | IL | AL | NH | |
| 76 | 75 | United Church Homes | OH | 6 | 4 | 0 | 0 | 2 | 6 | 4 | 0 | 0 | 2 | 0 |
| 77 | 49 | SantaFe Senior Living | FL | 3 | 1 | 2 | 0 | 0 | 3 | 1 | 2 | 0 | 0 | 0 |
| 78 | 78 | The Presbyterian Homes, Inc. of North Carolina | NC | 3 | 3 | 0 | 0 | 0 | 3 | 3 | 0 | 0 | 0 | 0 |
| 79 | 77 | Presby's Inspired Life | PA | 4 | 2 | 1 | 0 | 1 | 4 | 2 | 1 | 0 | 1 | 0 |
| 80 | 79 | United Church Homes & Services | NC | 3 | 3 | 0 | 0 | 0 | 4 | 3 | 0 | 0 | 1 | -1 |
| 81 | 80 | United Methodist Retirement Homes, Inc. | NC | 3 | 3 | 0 | 0 | 0 | 3 | 3 | 0 | 0 | 0 | 0 |
| 82 | 76 | Menno Haven | PA | 3 | 2 | 1 | 0 | 0 | 3 | 2 | 1 | 0 | 0 | 0 |
| 83 | 85 | United Methodist Memorial Home | IN | 4 | 3 | 0 | 1 | 0 | 3 | 2 | 0 | 1 | 0 | 1 |
| 84 | 86 | Mather LifeWays | IL | 5 | 2 | 2 | 0 | 1 | 5 | 2 | 2 | 0 | 1 | 0 |
| 85 | 73 | VMP | WI | 2 | 2 | 0 | 0 | 0 | 3 | 2 | 1 | 0 | 0 | -1 |
| 86 | 87 | Oakwood Lutheran Senior Ministries | WI | 2 | 2 | 0 | 0 | 0 | 2 | 2 | 0 | 0 | 0 | 0 |
| 87 | 88 | Cedar Community | WI | 5 | 2 | 1 | 1 | 1 | 5 | 2 | 1 | 1 | 1 | 0 |
| 88 | 84 | Christian Care Centers | TX | 3 | 3 | 0 | 0 | 0 | 3 | 3 | 0 | 0 | 0 | 0 |
| 89 | **NR | Westminster Ingleside Retirement Communities | DC | 3 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 |
| 90 | 89 | Presbyterian Communities and Services | TX | 2 | 2 | 0 | 0 | 0 | 2 | 2 | 0 | 0 | 0 | 0 |
| 91 | 83 | St. Ann's Community | NY | 2 | 2 | 0 | 0 | 0 | 2 | 2 | 0 | 0 | 0 | 0 |
| 92 | 90 | Simpson Senior Services | PA | 3 | 3 | 0 | 0 | 0 | 3 | 3 | 0 | 0 | 0 | 0 |
| 93 | 93 | Living Branches | PA | 3 | 2 | 0 | 1 | 0 | 3 | 2 | 0 | 1 | 0 | 0 |
| 94 | 91 | Presbyterian Communities of South Carolina | SC | 5 | 5 | 0 | 0 | 0 | 5 | 5 | 0 | 0 | 0 | 0 |
| 95 | 95 | LutherCare | PA | 3 | 1 | 1 | 0 | 1 | 3 | 1 | 1 | 0 | 1 | 0 |
| 96 | 92 | Goodwin House Incorporated | VA | 2 | 2 | 0 | 0 | 0 | 2 | 2 | 0 | 0 | 0 | 0 |
| 97 | **NR | Givens Estates Retirement Community | NC | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| 98 | 96 | Elder Care Alliance | CA | 6 | 1 | 0 | 5 | 0 | 6 | 1 | 0 | 5 | 0 | 0 |
| 99 | 100 | Western Home Communities | IA | 3 | 1 | 2 | 0 | 0 | 3 | 1 | 2 | 0 | 0 | 0 |
| 100 | 98 | Morningside Ministries | TX | 3 | 3 | 0 | 0 | 0 | 3 | 3 | 0 | 0 | 0 | 0 |
| Total Communities | | | | 961 | 512 | 139 | 162 | 148 | 943 | 496 | 135 | 161 | 150 | 18 |

** NR: Not Ranked in that year

4-2 2013 LeadingAge Ziegler 100

Analysis of the Data: Communities

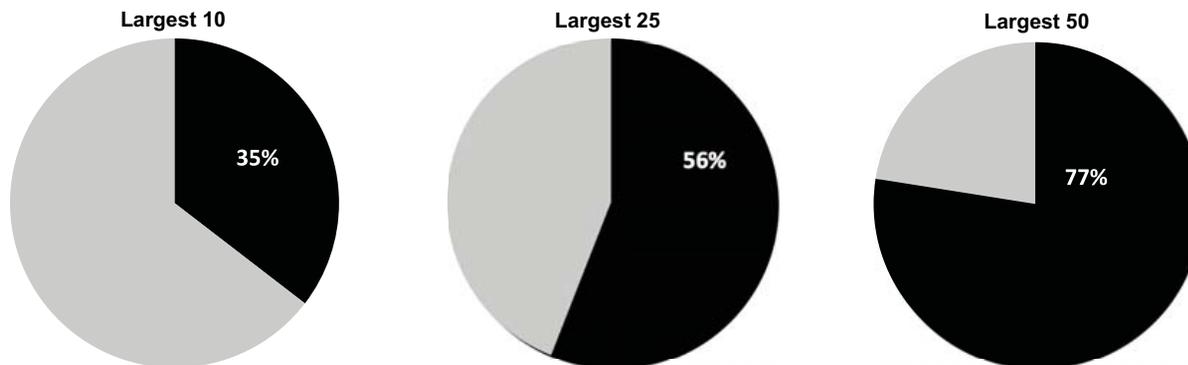
4-2b SUMMARY OF COMMUNITY MIX (BY LARGEST 10, 25, 50 & TOTAL)

| Largest | CCRC | IL | AL | NH | ALL | % as total of LZ 100 |
|---------|------|-----|-----|-----|-----|----------------------|
| 10 | 191 | 43 | 42 | 61 | 337 | 35% |
| 25 | 292 | 69 | 80 | 87 | 528 | 55% |
| 50 | 378 | 104 | 123 | 130 | 735 | 77% |
| 100 | 506 | 143 | 159 | 152 | 960 | 100% |

| Analysis of Community Mix for Each Year's Respective LZ 100 Listing | | | | | |
|---|-------|-------|-------|-------|--------|
| 2011 LZ 100 | | | | | |
| 2010 avg communities/system | 4.8 | 1.4 | 1.6 | 1.5 | 9.4 |
| % of total | 50.3% | 15.4% | 16.6% | 16.6% | 100.0% |
| 2012 LZ 100 | | | | | |
| 2011 avg communities/system | 4.8 | 1.5 | 1.6 | 1.7 | 9.6 |
| % of total | 50.3% | 15.4% | 16.8% | 17.6% | 100.0% |
| 2013 LZ 100 | | | | | |
| 2012 avg communities/system | 5.1 | 1.4 | 1.6 | 1.5 | 9.6 |
| % of total | 53.3% | 14.5% | 16.9% | 15.4% | 100.0% |

| Analysis of Community Mix for 2013 LZ 100 | | | | | |
|---|-------|-------|-------|-------|--------|
| 2010 avg communities/system | 5.0 | 1.4 | 1.7 | 1.6 | 9.6 |
| % of total | 51.6% | 14.7% | 17.2% | 16.6% | 100.0% |
| 2011 avg communities/system | 5.1 | 1.4 | 1.7 | 1.6 | 9.6 |
| % of total | 52.3% | 14.6% | 17.0% | 16.1% | 100.0% |
| 2012 avg communities/system | 5.1 | 1.4 | 1.6 | 1.5 | 9.6 |
| % of total | 53.1% | 14.8% | 16.7% | 15.6% | 100.0% |

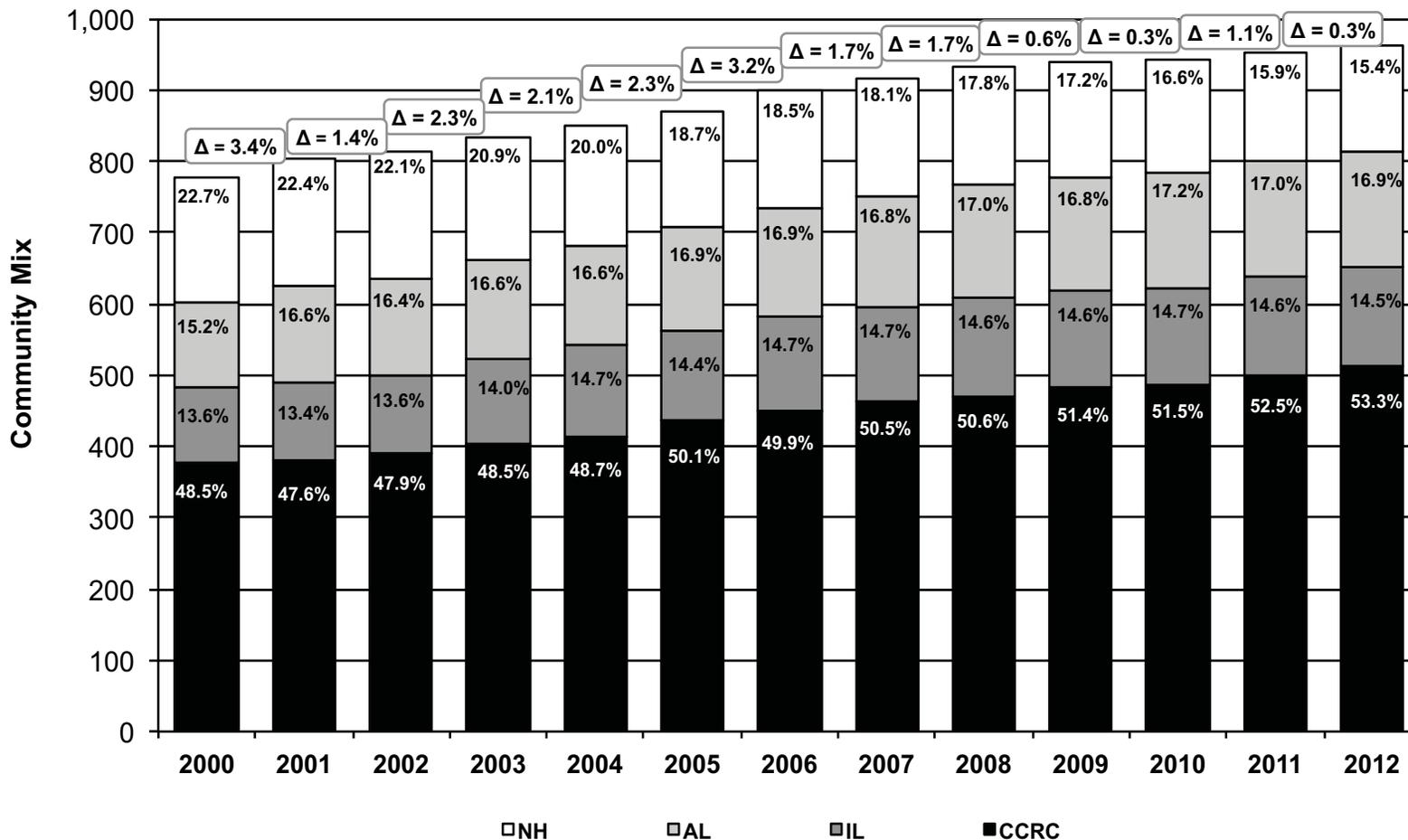
4-2c PERCENTAGE OF TOTAL COMMUNITIES OWNED (BY LARGEST 10, 25, 50)



4-2 2013 LeadingAge Ziegler 100

Analysis of the Data: Communities

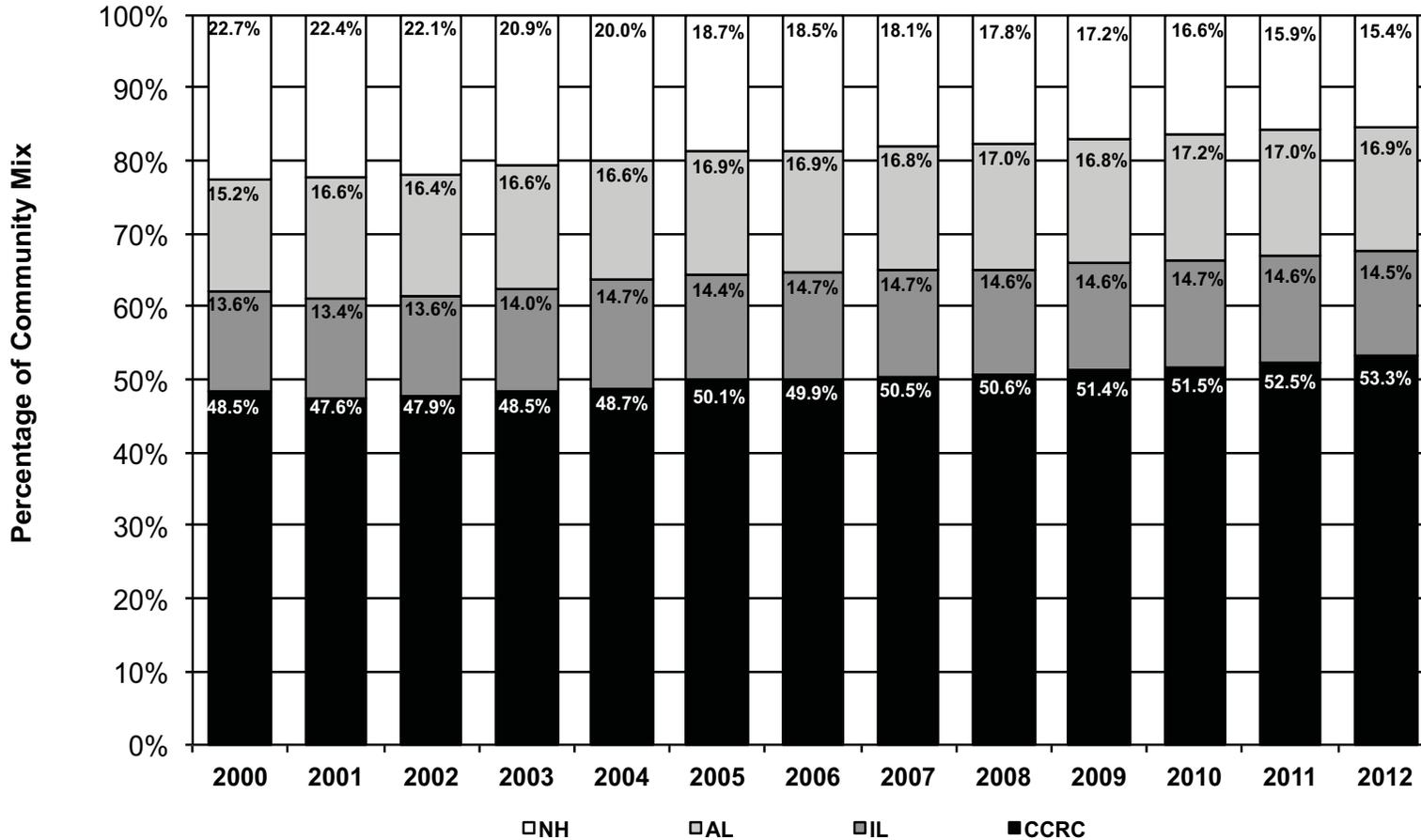
4-2d TOTAL COMMUNITY MIX BY YEAR, BY TOTAL COMMUNITIES, 2000 THROUGH 2012, FOR 2013 LZ 100



4-2 2013 LeadingAge Ziegler 100

Analysis of the Data: Communities

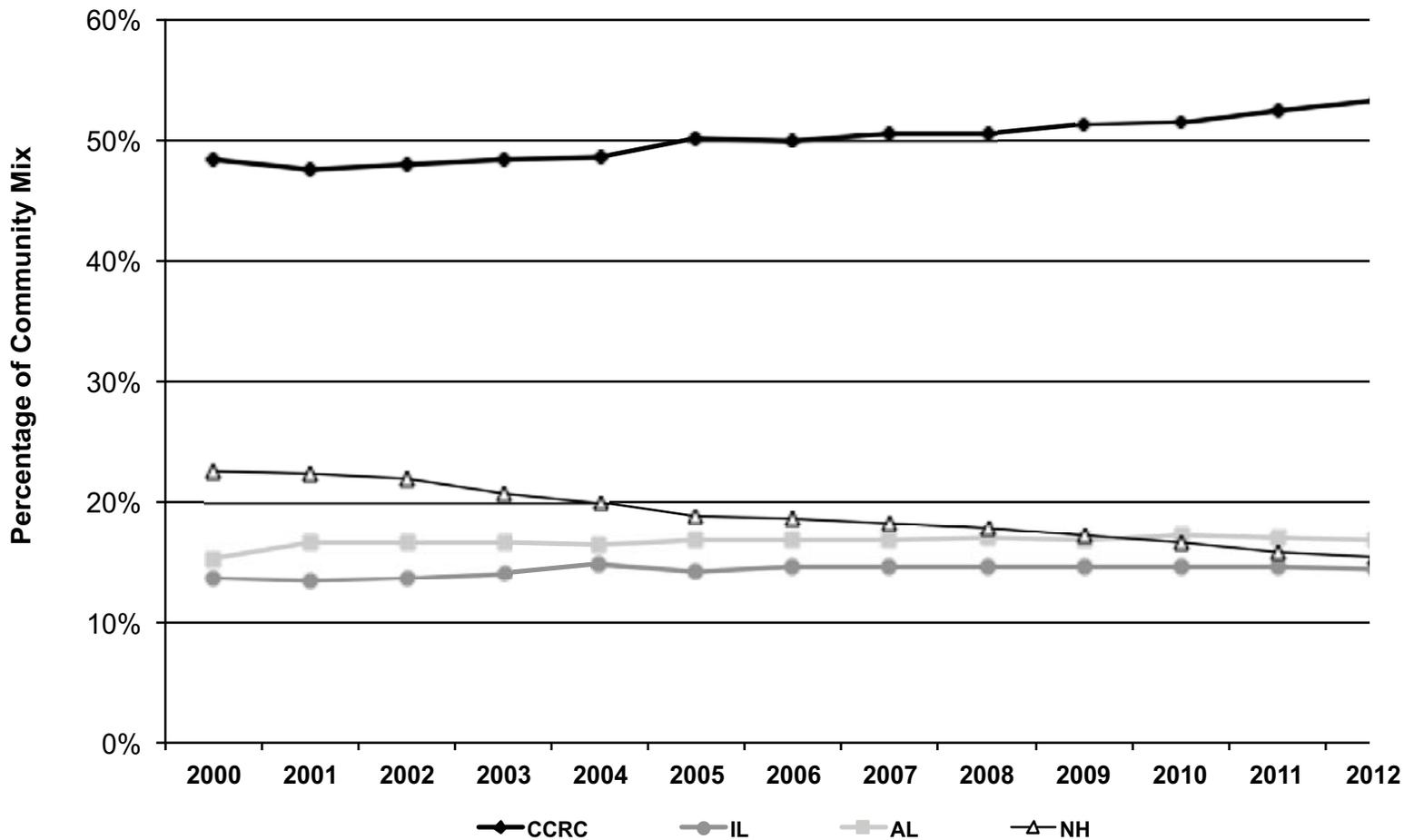
4-2e TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2012, FOR 2013 LZ 100



4-2 2013 LeadingAge Ziegler 100

Analysis of the Data: Communities

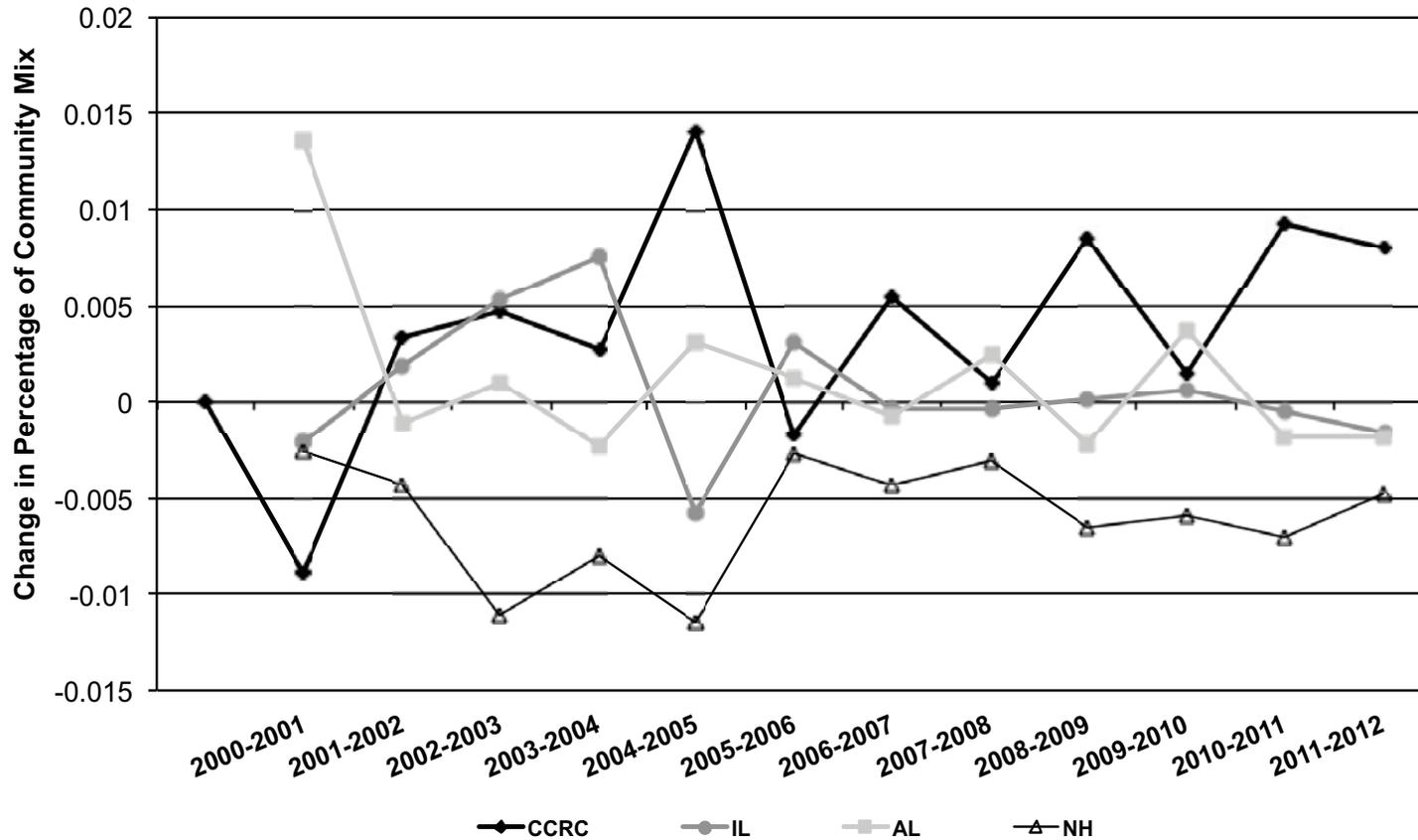
4-2f TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2012, FOR 2013 LZ 100



4-2 2013 LeadingAge Ziegler 100

Analysis of the Data: Communities

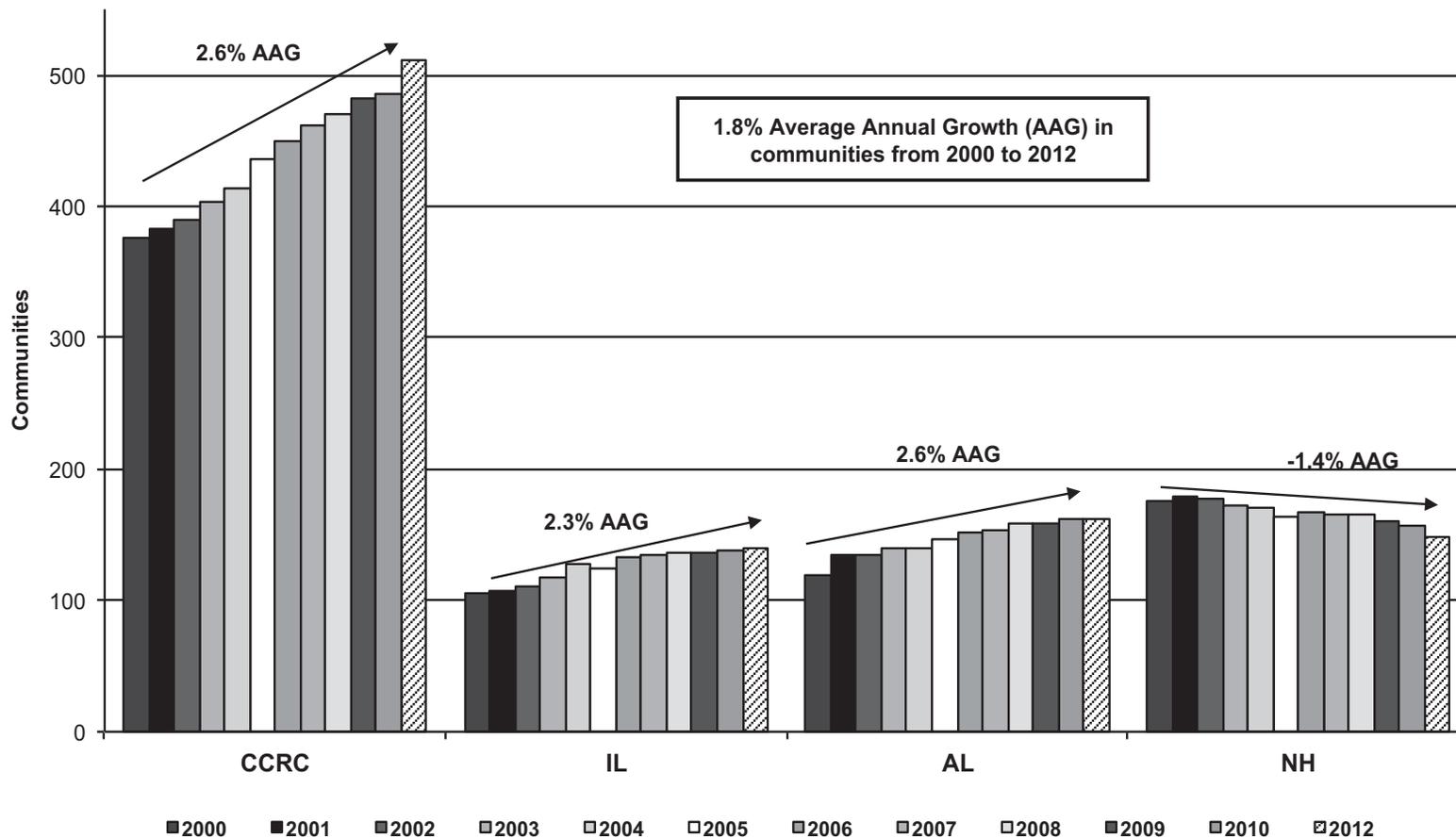
4-2g YEAR OVER YEAR CHANGE IN PERCENTAGE OF COMMUNITY MIX, 2000 THROUGH 2012, FOR 2013 LZ 100



4-2 2013 LeadingAge Ziegler 100

Analysis of the Data: Communities

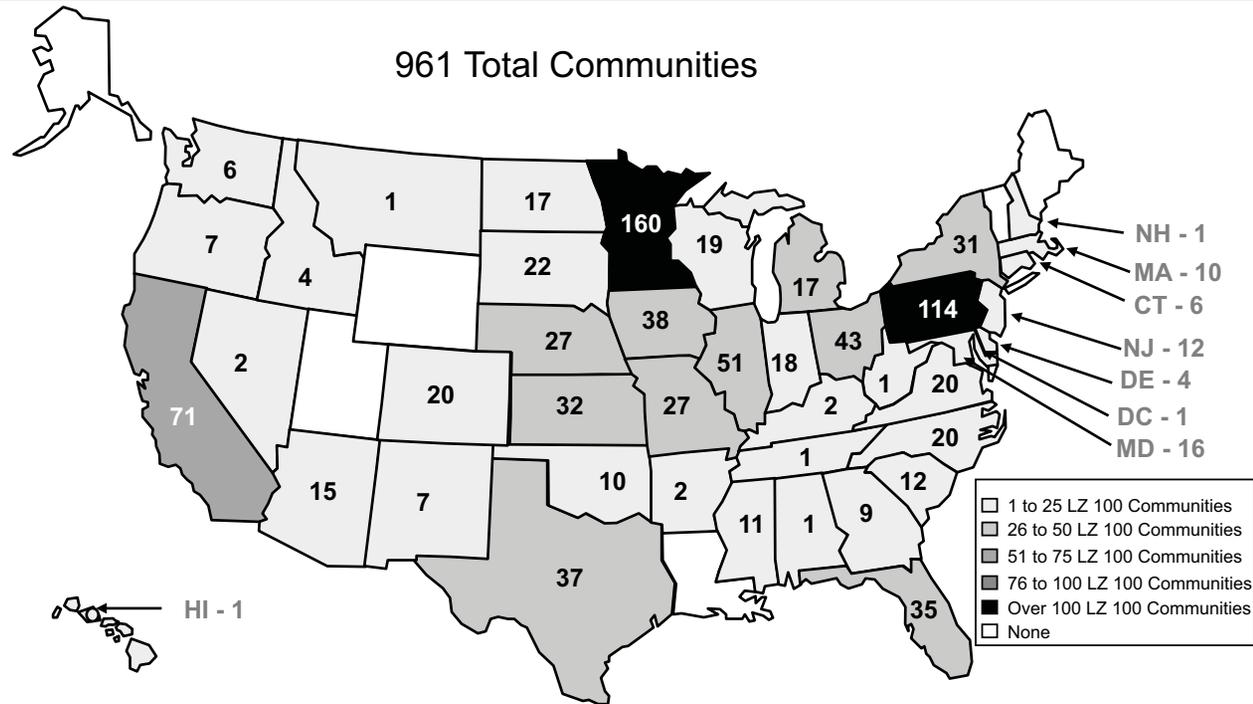
4-2h COMMUNITY TYPE COMPARISON, BY COMMUNITY, 2000 THROUGH 2012, FOR 2013 LZ 100



4-3 2013 LeadingAge Ziegler 100

Analysis of the Data: Locations

4-3a COMMUNITY LOCATIONS



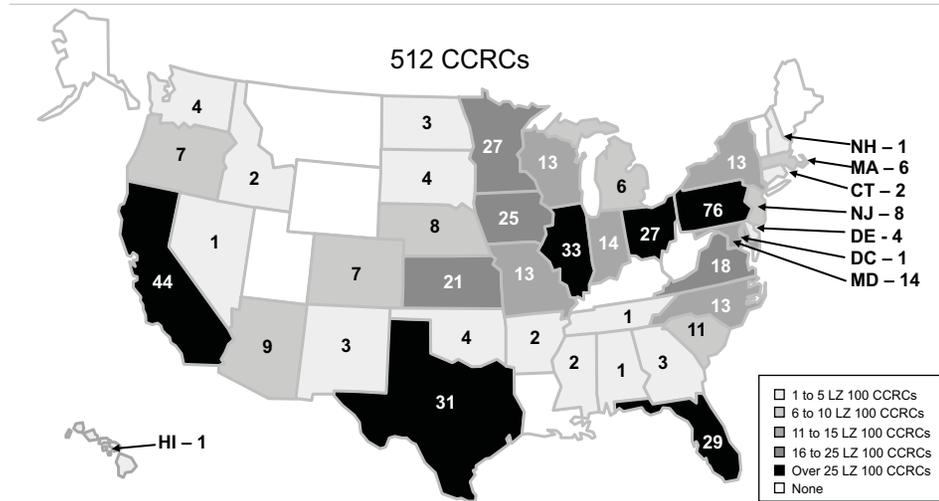
4-3b TOP FIVE STATES BY COMMUNITY TYPE

| CCRC | | | IL | | | AL | | | NH | | | AFFORDABLE HSG | | |
|------|----|----|----|------------|----|----|----|----|----|--------|----|----------------|------------|----|
| 1 | PA | 76 | 1 | MN | 38 | 1 | MN | 52 | 1 | MN | 43 | 1 | CA | 99 |
| 2 | CA | 44 | 2 | PA | 15 | 2 | PA | 15 | 2 | OH, NY | 10 | 2 | PA | 74 |
| 3 | IL | 33 | 3 | CA | 9 | 3 | CA | 14 | 3 | IA | 9 | 3 | OH | 66 |
| 4 | TX | 31 | 4 | IL | 8 | 4 | NE | 10 | 4 | NE, PA | 8 | 4 | TX | 60 |
| 5 | FL | 29 | 5 | MI, MO, MS | 7 | 5 | ND | 9 | 5 | KS, SD | 7 | 5 | FL, MI, NJ | 36 |

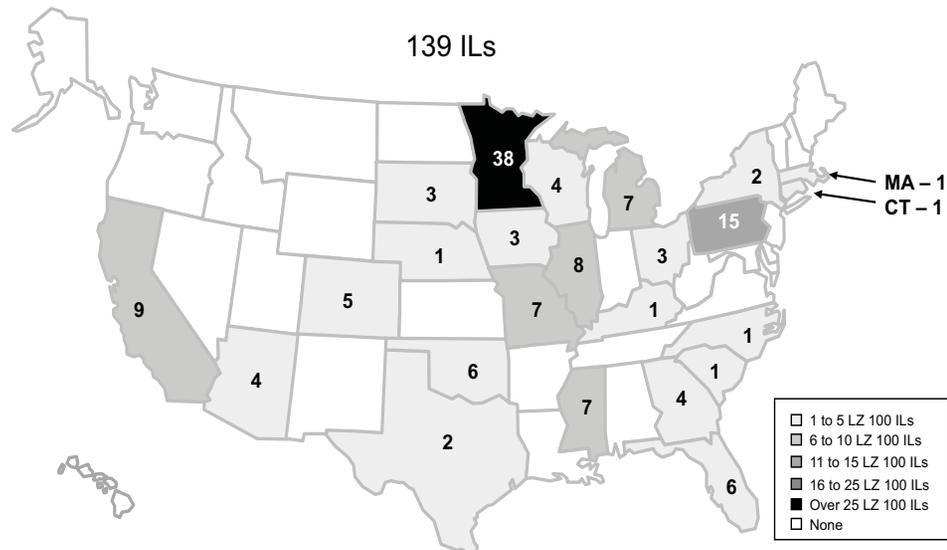
4-3 2013 LeadingAge Ziegler 100

Analysis of the Data: Locations

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



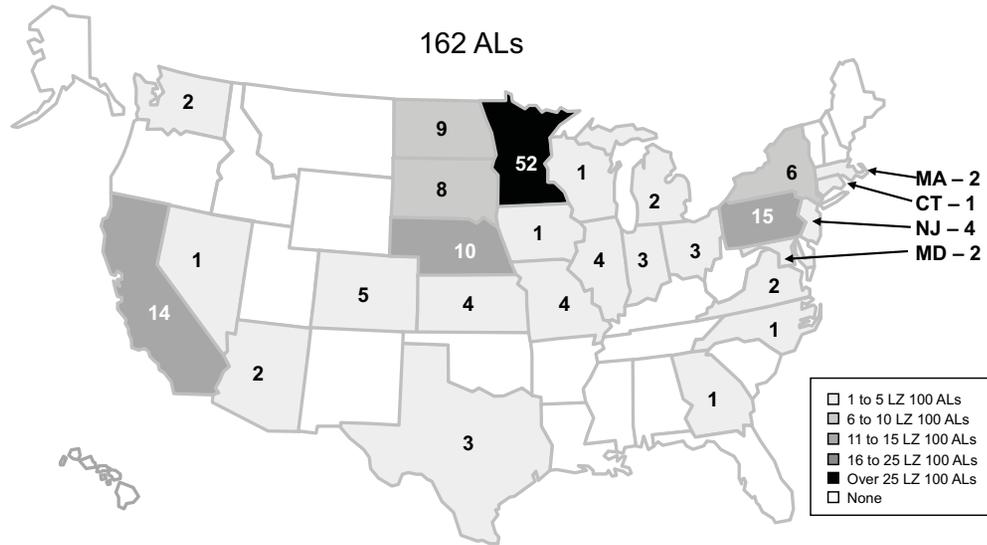
4-3d INDEPENDENT LIVING (IL) COMMUNITY LOCATIONS



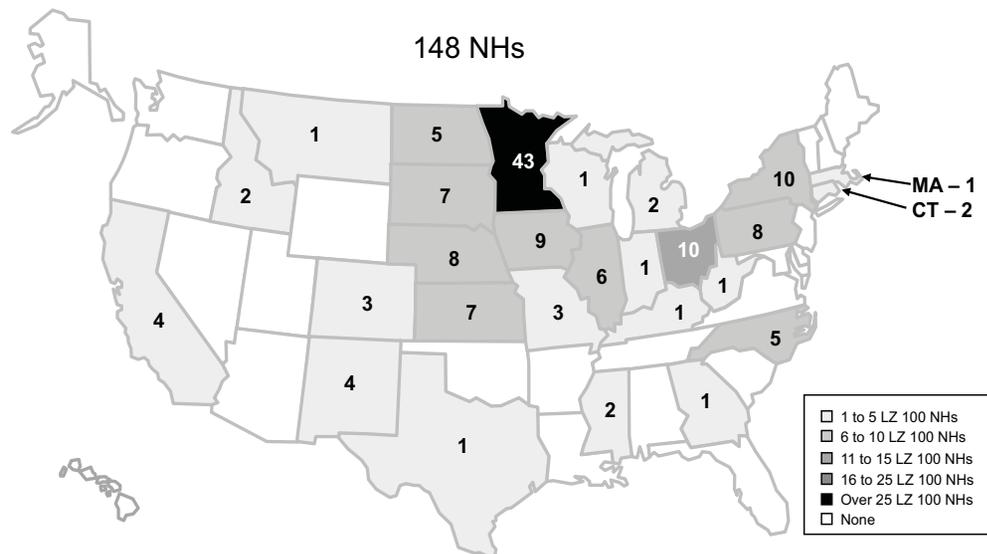
4-3 2013 LeadingAge Ziegler 100

Analysis of the Data: Locations

4-3e ASSISTED LIVING (AL) COMMUNITY LOCATIONS



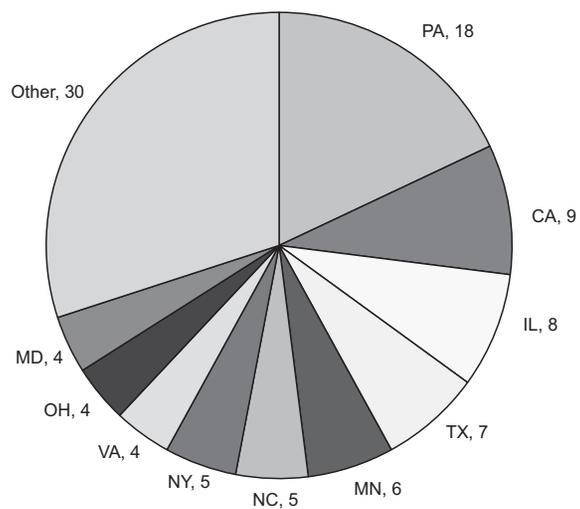
4-3f NURSING HOME (NH) LOCATIONS



4-4 2013 LeadingAge Ziegler 100

Analysis of the Data: System Headquarters

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



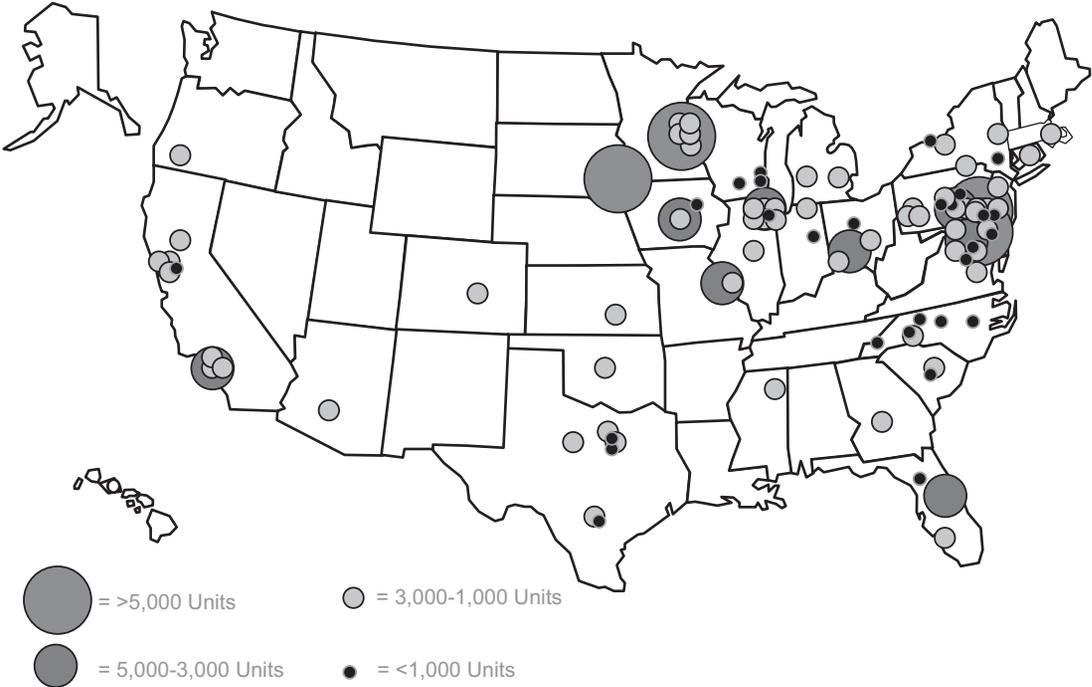
4-4b HEADQUARTER LOCATIONS



4-4 2013 LeadingAge Ziegler 100

Analysis of the Data: System Headquarters

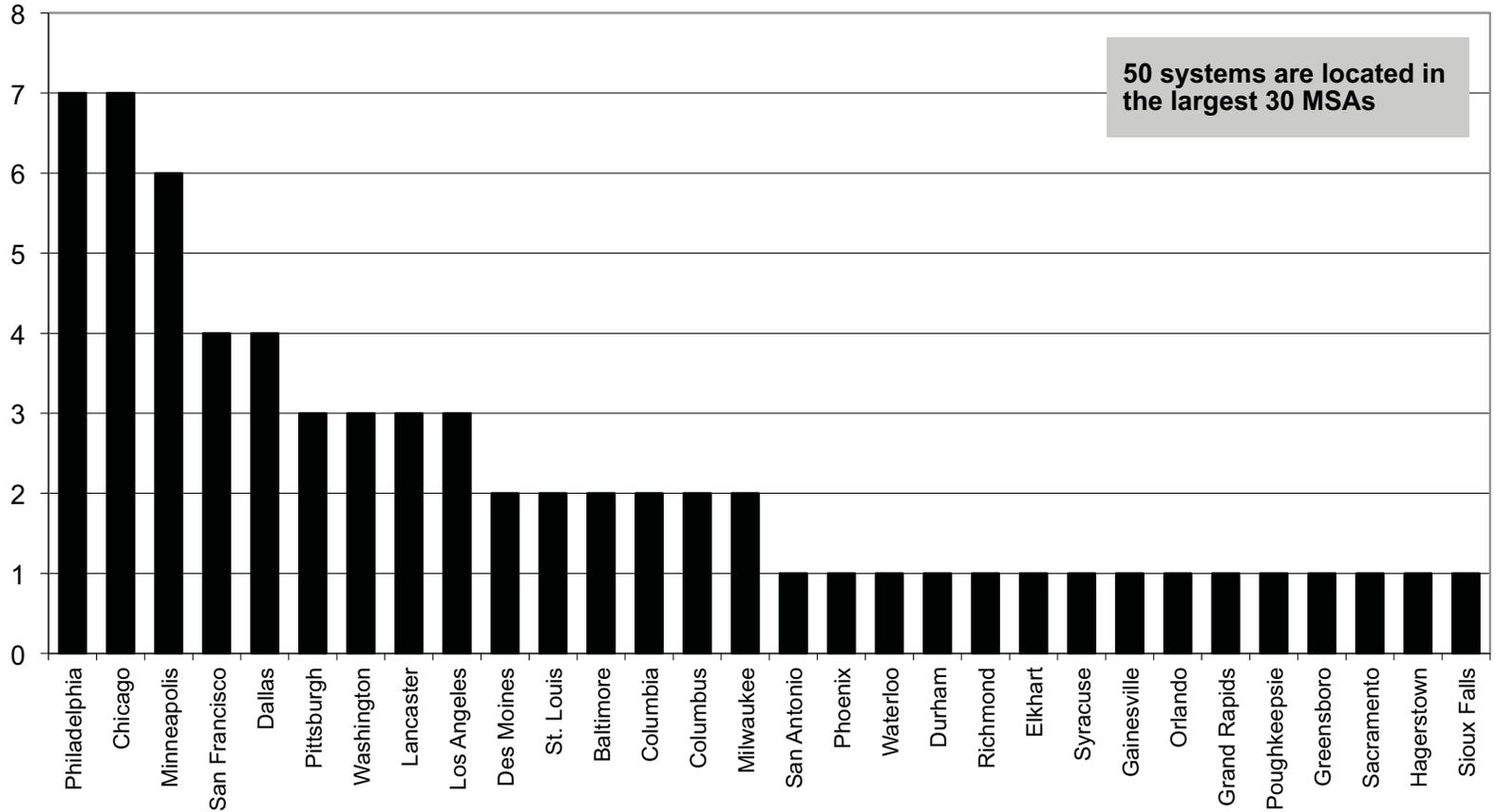
4-4c HEADQUARTER LOCATION BY SIZE



4-5 2013 LeadingAge Ziegler 100

Analysis of the Data: Metropolitan Statistical Areas (MSAs)

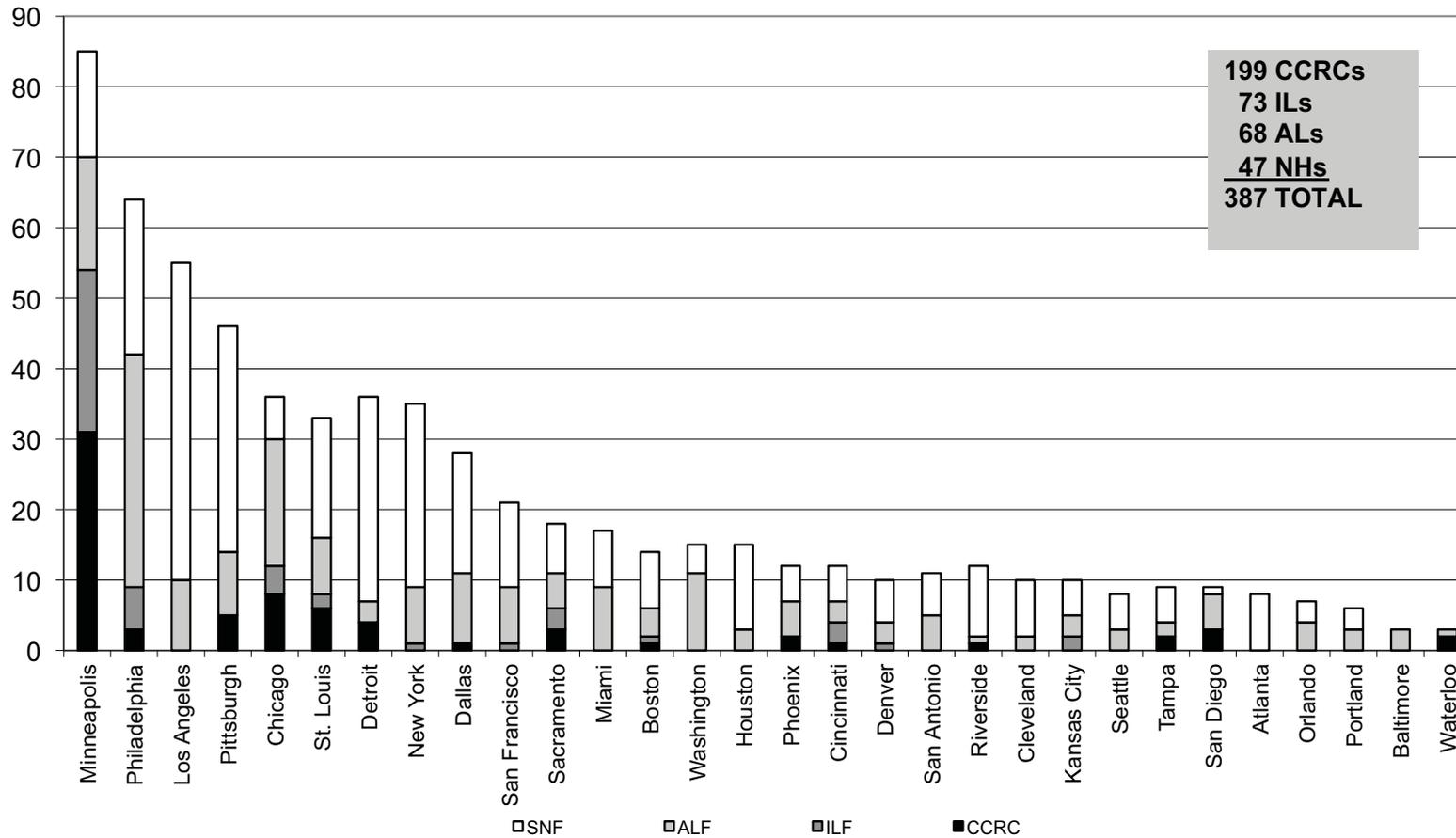
4-5a NUMBER OF HEADQUARTERS LOCATED IN THE LARGEST 30 MSAs



4-5 2013 LeadingAge Ziegler 100

Analysis of the Data: Metropolitan Statistical Areas (MSAs)

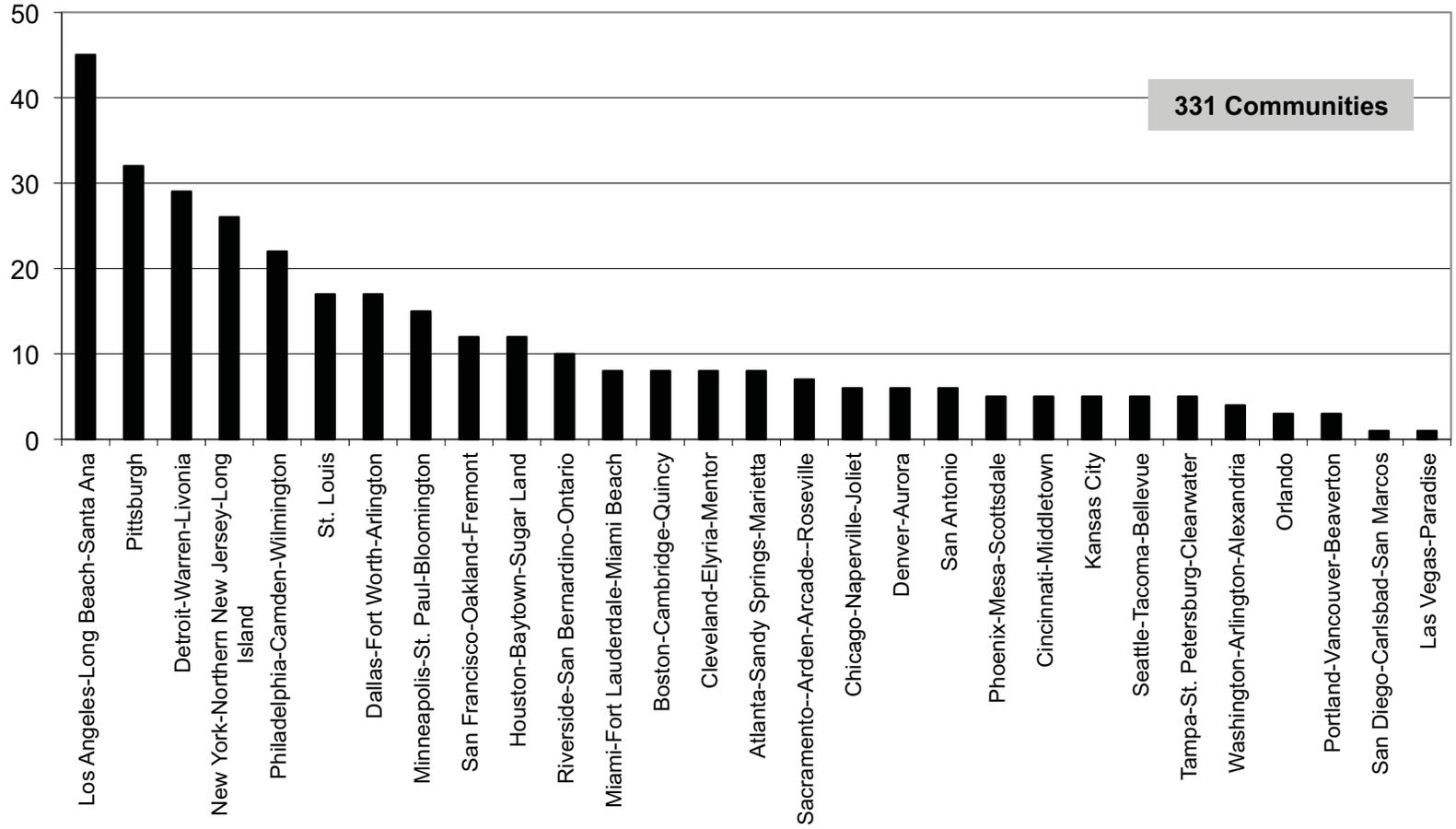
4-5b NUMBER OF COMMUNITIES LOCATED IN THE LARGEST 30 MSAs BY TYPE



4-5 2013 LeadingAge Ziegler 100

Analysis of the Data: Metropolitan Statistical Areas (MSAs)

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



4-6 2013 LeadingAge Ziegler 100

Analysis of the Data: Classifications

4-6a 2013 RANK, DETAILED BY CLASSIFICATION

| 2013 Rank | System Name | State | Classification | |
|-----------|---|-------|----------------------|----------------------|
| | | | Primary | Secondary |
| 1 | Evangelical Lutheran Good Samaritan Society | SD | National | <i>none</i> |
| 2 | National Senior Campuses | MD | National | <i>Across states</i> |
| 3 | ACTS Retirement-Life Communities, Inc. | PA | National | <i>Across states</i> |
| 4 | Presbyterian Homes and Services | MN | Tri-state | <i>Single state</i> |
| 5 | Covenant Retirement Communities | IL | National | <i>none</i> |
| 6 | Retirement Housing Foundation | CA | National | <i>Single state</i> |
| 7 | Lifespace Communities, Inc. | IA | National | <i>none</i> |
| 8 | The Kendal Corporation | PA | National | <i>none</i> |
| 9 | Westminster Communities of Florida | FL | Single state | <i>none</i> |
| 10 | Lutheran Senior Services | MO | Bi-state | <i>Metropolitan</i> |
| 11 | Presbyterian Senior Living | PA | <i>Across states</i> | <i>Single state</i> |
| 12 | Ohio Presbyterian Retirement Services | OH | Single state | <i>none</i> |
| 13 | Cornerstone Affiliates | CA | <i>Across states</i> | <i>Single state</i> |
| 14 | Pacific Retirement Services, Inc. | OR | National | <i>Single state</i> |
| 15 | Asbury Communities | MD | National | <i>Bi-state</i> |
| 16 | Christian Homes, Inc. | IL | <i>Across states</i> | <i>Single state</i> |
| 17 | Front Porch | CA | Single state | <i>none</i> |
| 18 | Ecumen | MN | Tri-state | <i>Single state</i> |
| 19 | Volunteers of America | VA | National | <i>none</i> |
| 20 | Presbyterian Manors of Mid-America | KS | Bi-state | <i>Single state</i> |
| 21 | Diakon Lutheran Social Ministries | PA | Bi-state | <i>Single state</i> |
| 22 | Masonic Villages | PA | Single state | <i>none</i> |
| 23 | Shell Point | FL | Single state | <i>State region</i> |
| 24 | Willow Valley Retirement Communities | PA | Metropolitan | <i>none</i> |
| 25 | Providence Life Services | IL | Bi-state | <i>Metropolitan</i> |

4-6 2013 LeadingAge Ziegler 100

Analysis of the Data: Classifications

4-6a 2013 RANK, DETAILED BY CLASSIFICATION

| 2013 Rank | System Name | State | Classification | |
|-----------|---|-------|----------------|-------------------------|
| | | | Primary | Secondary |
| 26 | Franciscan Communities | IL | Across states | <i>Metropolitan</i> |
| 27 | Augustana Care Corporation | MN | Bi-state | <i>Metropolitan</i> |
| 28 | Otterbein Senior Lifestyle Choices | OH | Single state | <i>State region</i> |
| 29 | Christian Care Companies | AZ | Single state | <i>Metropolitan</i> |
| 30 | Concordia Lutheran Ministries | PA | Metropolitan | <i>none</i> |
| 31 | National Church Residences | OH | National | <i>Single state</i> |
| 32 | The Eddy | NY | Metropolitan | <i>none</i> |
| 33 | Elim Care | MN | Tri-state | <i>Metropolitan</i> |
| 34 | Homewood Retirement Centers | MD | Tri-state | <i>none</i> |
| 35 | Springpoint Senior Living | NJ | Single state | <i>State region</i> |
| 36 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | State region | <i>Metropolitan</i> |
| 37 | Hebrew SeniorLife | MA | Metropolitan | <i>none</i> |
| 38 | Senior Quality Lifestyles Corporation | TX | Single State | <i>none</i> |
| 39 | Eskaton | CA | State region | <i>Metropolitan</i> |
| 40 | Bethesda Health Group, Inc.* | MO | Metropolitan | <i>Sub-metropolitan</i> |
| 41 | Episcopal Senior Communities | CA | State region | <i>none</i> |
| 42 | Magnolia Manor, Inc.* | GA | Single state | <i>none</i> |
| 43 | be.group | CA | Bi-state | <i>State region</i> |
| 44 | Buckner Retirement Services, Inc. | TX | Single state | <i>none</i> |
| 45 | Greencroft | IN | Bi-State | <i>State region</i> |
| 46 | Presbyterian Homes | IL | Metropolitan | <i>Sub-metropolitan</i> |
| 47 | Holland Home | MI | Metropolitan | <i>none</i> |
| 48 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | Metropolitan | <i>none</i> |
| 49 | Mississippi Methodist Senior Services | MS | Single state | <i>none</i> |
| 50 | WesleyLife | IA | State region | <i>none</i> |

* No data received from provider for current reporting year

4-6 2013 LeadingAge Ziegler 100

Analysis of the Data: Classifications

4-6a 2013 RANK, DETAILED BY CLASSIFICATION

| 2013 Rank | System Name | State | Classification | |
|-----------|--|-------|------------------|---------------------|
| | | | Primary | Secondary |
| 51 | Baptist Village Retirement Communities of Oklahoma | OK | Single state | <i>none</i> |
| 52 | Lutheran Services for the Aging | NC | State region | <i>none</i> |
| 53 | Masonicare | CT | Single state | <i>none</i> |
| 54 | Lutheran Life Communities | IL | Bi-state | <i>Metropolitan</i> |
| 55 | Bethesda Senior Living Communities | CO | National | <i>none</i> |
| 56 | Friendship Senior Options | IL | Single state | <i>none</i> |
| 57 | Phoebe Ministries | PA | State region | <i>none</i> |
| 58 | Virginia Baptist Homes | VA | State region | <i>none</i> |
| 59 | Virginia United Methodist Homes, Inc. | VA | Single state | <i>none</i> |
| 60 | American Baptist Homes of the Midwest* | MN | Across states | <i>none</i> |
| 61 | Lutheran SeniorLife | PA | Metropolitan | <i>none</i> |
| 62 | EMA, Inc. | MD | State region | <i>none</i> |
| 63 | Lutheran Social Services of South Central Pennsylvania | PA | State region | <i>none</i> |
| 64 | Sears Methodist Retirement System, Inc. | TX | Single state | <i>none</i> |
| 65 | Los Angeles Jewish Home for the Aged* | CA | Single state | <i>none</i> |
| 66 | Northern California Presbyterian Homes and Services | CA | State region | <i>Metropolitan</i> |
| 67 | Presbyterian SeniorCare | PA | State region | <i>Metropolitan</i> |
| 68 | United Methodist Homes | NY | Bi-state | <i>State region</i> |
| 69 | Presbyterian Villages of Michigan | MI | Single state | <i>Metropolitan</i> |
| 70 | Lutheran Homes of South Carolina | SC | Single state | <i>none</i> |
| 71 | Walker Methodist | MN | Metropolitan | <i>none</i> |
| 72 | United Methodist Homes of New Jersey | NJ | Single state | <i>none</i> |
| 73 | Wesley Enhanced Living | PA | State region | <i>Metropolitan</i> |
| 74 | Air Force Villages | TX | Sub-metropolitan | <i>none</i> |
| 75 | Elant | NY | State region | <i>none</i> |

* No data received from provider for current reporting year

4-6 2013 LeadingAge Ziegler 100

Analysis of the Data: Classifications

4-6a 2013 RANK, DETAILED BY CLASSIFICATION

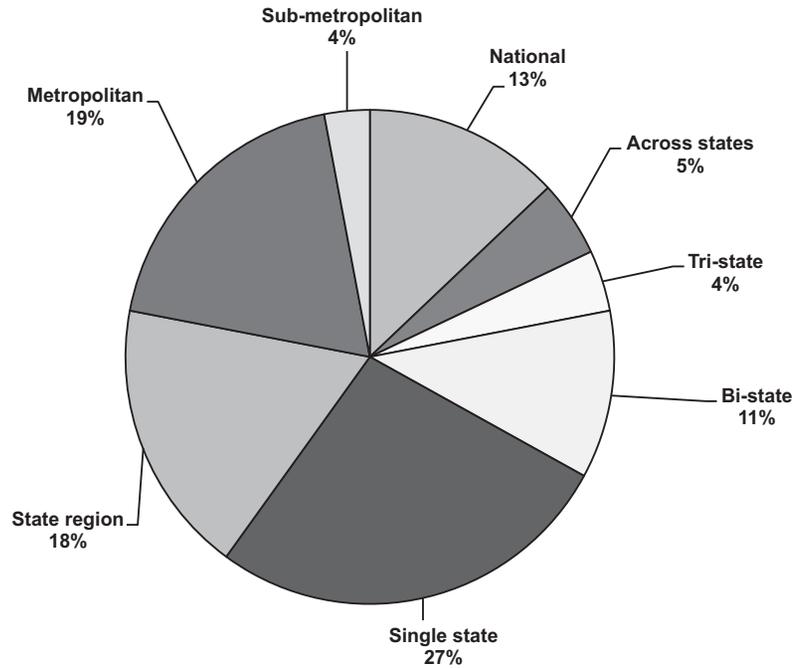
| 2013 Rank | System Name | State | Classification | |
|-----------|--|-------|------------------|-------------------------|
| | | | Primary | Secondary |
| 76 | United Church Homes | OH | National | <i>Single state</i> |
| 77 | SantaFe Senior Living | FL | Single state | <i>none</i> |
| 78 | The Presbyterian Homes, Inc. of North Carolina | NC | State region | <i>none</i> |
| 79 | Presby's Inspired Life | PA | Metropolitan | <i>none</i> |
| 80 | United Church Homes & Services | NC | Bi-state | <i>Single state</i> |
| 81 | United Methodist Retirement Homes, Inc. | NC | Single state | <i>none</i> |
| 82 | Menno Haven | PA | Metropolitan | <i>none</i> |
| 83 | United Methodist Memorial Home | IN | State region | <i>none</i> |
| 84 | Mather LifeWays | IL | Bi-state | <i>Sub-metropolitan</i> |
| 85 | VMP | WI | Metropolitan | <i>none</i> |
| 86 | Oakwood Lutheran Senior Ministries | WI | Metropolitan | <i>none</i> |
| 87 | Cedar Community | WI | State region | <i>Sub-metropolitan</i> |
| 88 | Christian Care Centers | TX | State region | <i>none</i> |
| 89 | Westminster Ingleside Retirement Communities | DC | Single state | <i>none</i> |
| 90 | Presbyterian Communities and Services | TX | Metropolitan | <i>none</i> |
| 91 | St. Ann's Community | NY | Metropolitan | <i>none</i> |
| 92 | Simpson Senior Services | PA | Metropolitan | <i>none</i> |
| 93 | Living Branches | PA | Metropolitan | <i>none</i> |
| 94 | Presbyterian Communities of South Carolina | SC | Single state | <i>none</i> |
| 95 | LutherCare | PA | State region | <i>none</i> |
| 96 | Goodwin House Incorporated | VA | Sub-metropolitan | <i>none</i> |
| 97 | Givens Estates Retirement Community | NC | Single state | <i>none</i> |
| 98 | Elder Care Alliance | CA | Single state | <i>Metropolitan</i> |
| 99 | Western Home Communities | IA | Metropolitan | <i>none</i> |
| 100 | Morningside Ministries | TX | Sub-metropolitan | <i>none</i> |

* No data received from provider for current reporting year

4-6 2013 LeadingAge Ziegler 100

Analysis of the Data: Classifications

4-6b PRIMARY CLASSIFICATIONS



4-6c SECONDARY CLASSIFICATIONS

| Primary Classification | Secondary Classification | # Organizations |
|----------------------------|--------------------------|-----------------|
| National | Across states | 2 |
| | Bi-state | 1 |
| | Single state | 4 |
| Across States | Single state | 3 |
| | Metropolitan | 1 |
| Tri-state | Single state | 2 |
| | Metropolitan | 1 |
| Bi-state | Single state | 3 |
| | State region | 3 |
| | Metropolitan | 4 |
| Single state | Sub-metropolitan | 1 |
| | State region | 3 |
| State region | Metropolitan | 3 |
| | Sub-metropolitan | 5 |
| Metropolitan | Sub-metropolitan | 1 |
| Metropolitan | Sub-metropolitan | 2 |
| Total Organizations | | 39 |

4-7 2013 LeadingAge Ziegler 100

Analysis of the Data: Corporate Name Changes

| 2013 Rank | Current System Name | Logo | Previous System Name |
|---------------|--|---|---|
| Next 50 | BHI Senior Living |  | Baptist Homes of Indiana |
| Next, Next 50 | Episcopal Communities & Services |  | The Episcopal Home Communities |
| Next 50 | Heritage Ministries |  | The Heritage Group |
| Next 50 | LifeStream Complete Senior Living |  | Arizona Baptist Retirement Centers |
| Next 50 | Messiah Lifeways |  | Messiah Villages |
| Next 50 | MRC Methodist Retirement Communities |  | Methodist Retirement Communities, The Woodlands |
| Next, Next 50 | Resthaven |  | Resthaven Patrons |
| Next 50 | Sunset Retirement Communities and Services |  | Sunset Association |

4-8 2013 LeadingAge Ziegler 100

Analysis of the Data: Debt Ratings as of 12/31/2012

4-8a LZ 100 WITH RATED DEBT AS OF 12/31/2012

| 2013 Rank | System Name | State | Rated | |
|-----------|---|-------|-------|-------|
| | | | S&P | Fitch |
| 3 | ACTS Retirement-Life Communities, Inc. | PA | BBB+ | A- |
| 73 | Air Force Villages | TX | NR | BBB- |
| 15 | Asbury Communities | MD | NR | BBB |
| 43 | be.group | CA | BBB- | NR |
| 40 | Bethesda Health Group, Inc.* | MO | NR | A- |
| 44 | Buckner Retirement Services, Inc. | TX | A- | A |
| 89 | Christian Care Centers | TX | BBB- | BBB- |
| 16 | Christian Homes, Inc. | IL | NR | BBB- |
| 30 | Concordia Lutheran Ministries | PA | A+ | NR |
| 13 | Cornerstone Affiliates | CA | BBB | BBB+ |
| 5 | Covenant Retirement Communities | IL | BBB- | BBB+ |
| 21 | Diakon Lutheran Social Ministries | PA | NR | BBB+ |
| 41 | Episcopal Senior Communities | CA | BBB | BBB+ |
| 39 | Eskaton | CA | BBB | NR |
| 1 | Evangelical Lutheran Good Samaritan Society | SD | A- | NR |
| 56 | Friendship Senior Options | IL | NR | BB- |
| 17 | Front Porch | CA | BBB | NR |
| 97 | Givens Estates Retirement Community | NC | NR | BBB |
| 96 | Goodwin House Incorporated | VA | NR | BBB |
| 47 | Holland Home | MI | NR | BB+ |
| 7 | Lifespace Communities, Inc. | IA | NR | A |
| 10 | Lutheran Senior Services | MO | NR | BBB+ |
| 22 | Masonic Villages | PA | A | NR |
| 53 | Masonicare | CT | BBB | NR |
| 66 | Northern California Presbyterian Homes and Services | CA | BBB | NR |
| 12 | Ohio Presbyterian Retirement Services | OH | BBB | NR |
| 28 | Otterbein Senior Lifestyle Choices | OH | A- | NR |
| 11 | Presbyterian Senior Living | PA | BBB+ | NR |
| 69 | Presbyterian Villages of Michigan | MI | NR | BB+ |
| 23 | Shell Point | FL | BB | NR |
| 35 | Springpoint Senior Living | NJ | NR | BBB+ |
| 72 | United Methodist Homes of New Jersey | NJ | BB+ | NR |
| 73 | Wesley Enhanced Living | PA | NR | BB |
| 9 | Westminster Communities of Florida | FL | NR | A- |
| 24 | Willow Valley Retirement Communities | PA | A- | A- |

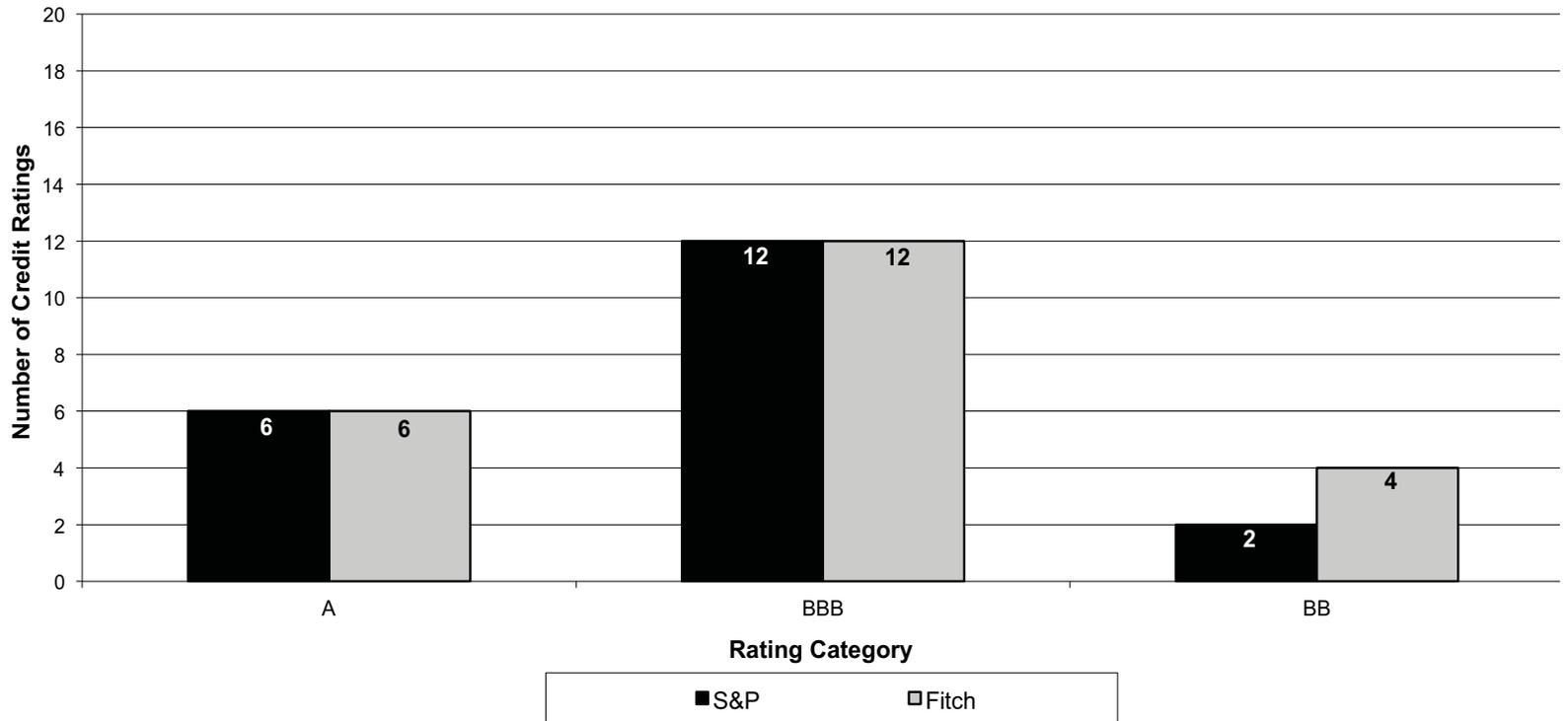
* No data received from provider for current reporting year

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

4-8 2013 LeadingAge Ziegler 100

Analysis of the Data: Debt Ratings

4-8b RATINGS BY CATEGORY



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

4-9 2013 LeadingAge Ziegler 100

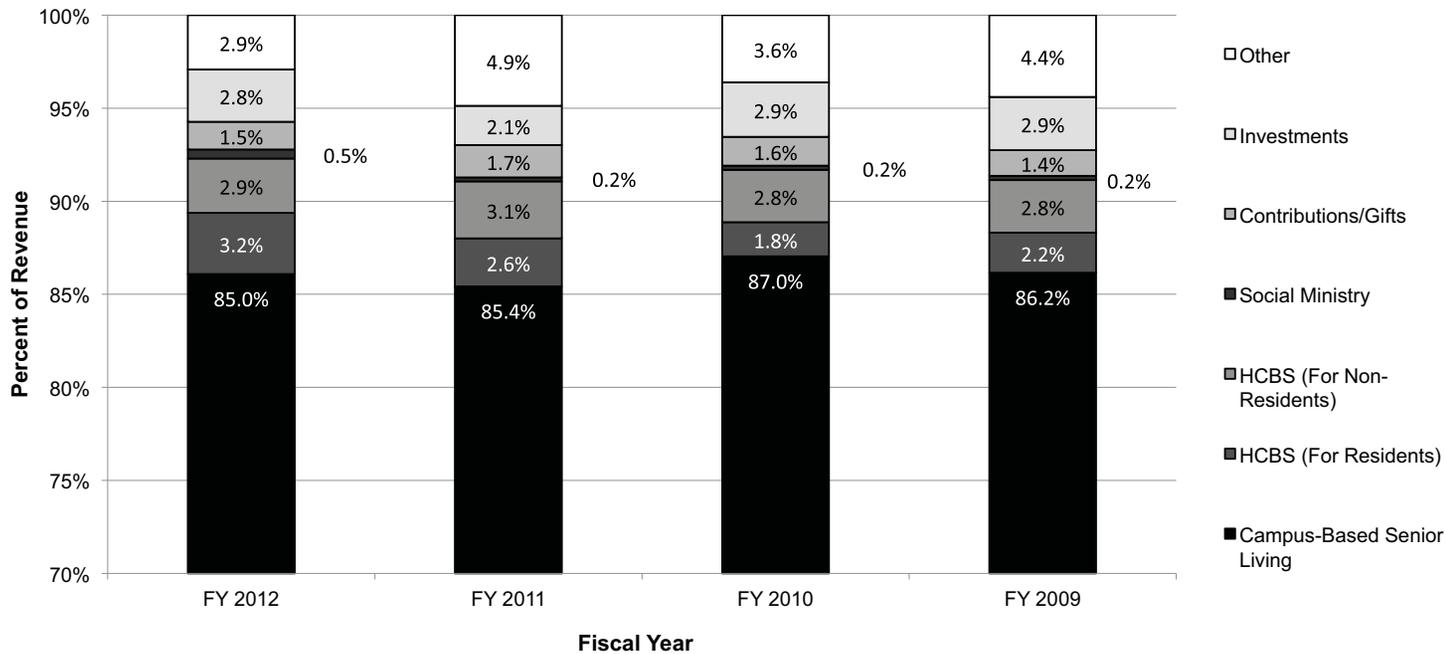
Analysis of the Data: Revenues

4-9a AVERAGE PERCENT MIX OF REVENUE, FISCAL YEAR 2012

| 2012 Analysis by Largest 10, 25, 50 & Total | | | | | | | |
|---|----------------------------|----------------------|--------------------------|-----------------|-----------------------|-------------|--------|
| Largest | Campus-Based Senior Living | HCBS (For Residents) | HCBS (For Non-Residents) | Social Ministry | Contributions / Gifts | Investments | Other* |
| 10 | 79.0% | 5.5% | 1.1% | 0.2% | 0.8% | 2.6% | 1.0% |
| 25 | 81.7% | 4.6% | 2.2% | 0.4% | 1.1% | 3.0% | 2.6% |
| 50 | 80.0% | 5.6% | 3.9% | 0.4% | 1.3% | 2.7% | 3.6% |
| 100 | 85.0% | 3.2% | 2.9% | 0.5% | 1.5% | 2.8% | 2.9% |

*'Other' includes revenues such as management & development fees, miscellaneous resident services, charity care, selling/leasing of land, etc.

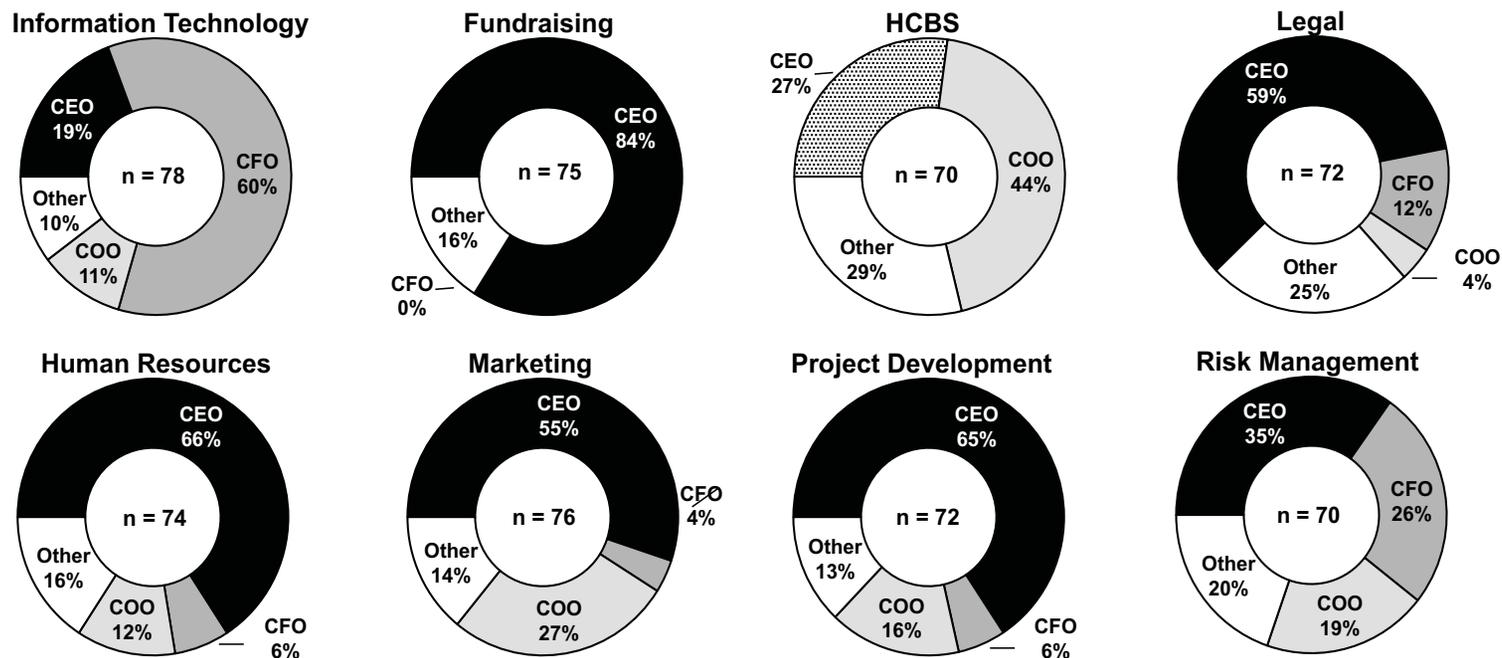
4-9b AVERAGE PERCENT MIX OF REVENUE, FISCAL YEAR 2009-2012



4-10 2013 LeadingAge Ziegler 100

Analysis of the Data: Corporate Structure

4-10a 2013 LZ 100 CORPORATE LEVEL POSITIONS, BY AREA AND REPORTING EXECUTIVE

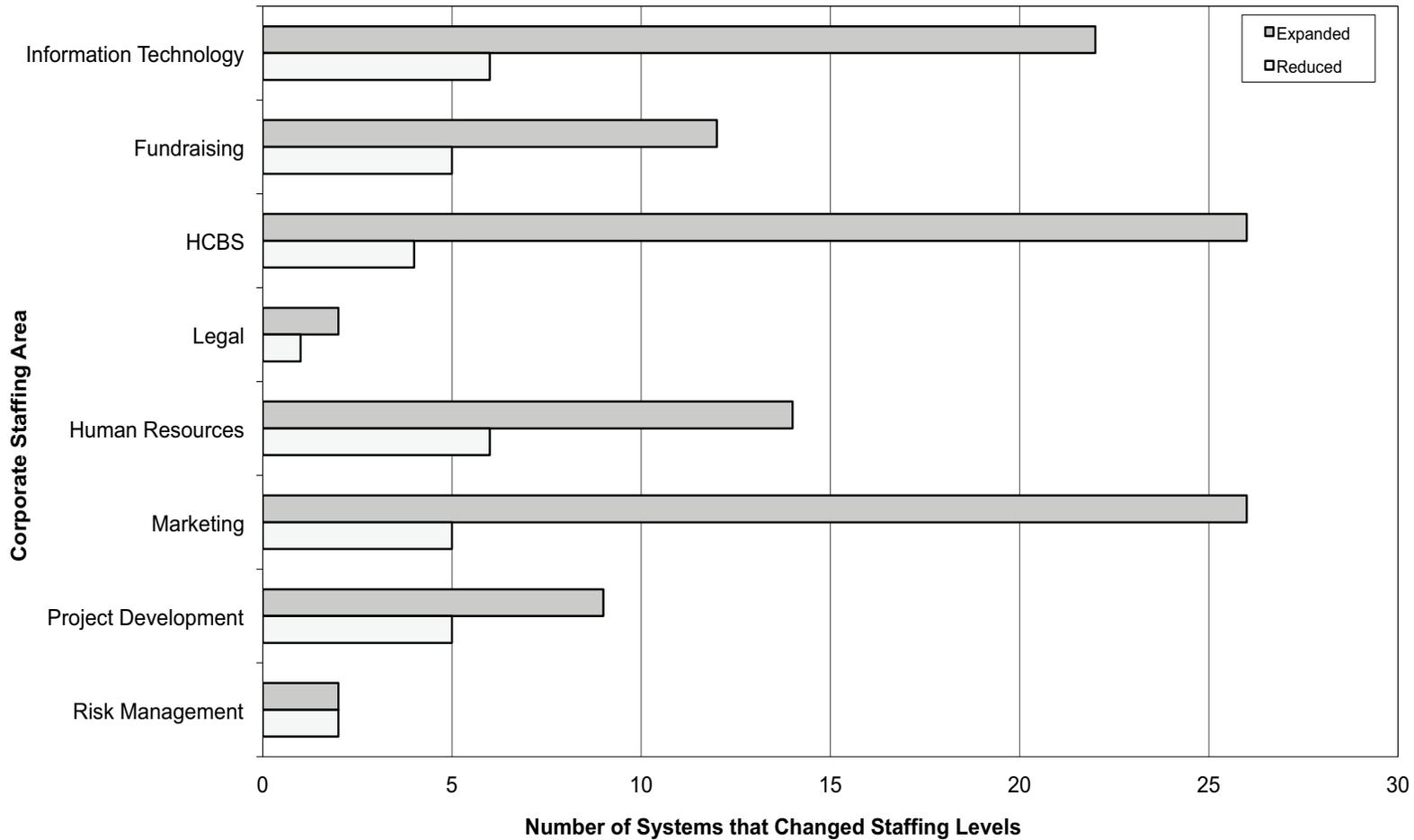


2013 LZ 100 systems (n = 80) responded to questions related to Corporate Level positions and to whom each position reports; individual n's represent the number of systems that have a position for each area.

4-10 2013 LeadingAge Ziegler 100

Analysis of the Data: Corporate Structure

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



4-11 2013 LeadingAge Ziegler 100

Analysis of the Data: CARF-CCAC Accreditation

4-11a LZ 100 WITH CARF-CCAC ACCREDITATION

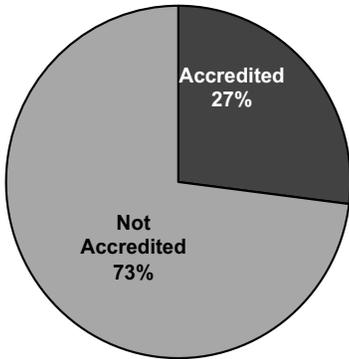
| 2013 Rank | System Name | State | # Accredited Communities |
|-------------------------------------|---|-------|--------------------------|
| 3 | ACTS Retirement-Life Communities, Inc. | PA | 18 |
| 5 | Covenant Retirement Communities | IL | 12 |
| 11 | Presbyterian Senior Living | PA | 11 |
| 13 | Cornerstone Affiliates | CA | 10 |
| 7 | Lifespace Communities, Inc. | IA | 10 |
| 8 | The Kendal Corporation | PA | 8 |
| 14 | Pacific Retirement Services, Inc. | OR | 7 |
| 15 | Asbury Communities | MD | 5 |
| 35 | Springpoint Senior Living | NJ | 5 |
| 59 | Virginia United Methodist Homes, Inc. | VA | 5 |
| 41 | Episcopal Senior Communities | CA | 4 |
| 24 | Willow Valley Retirement Communities | PA | 4 |
| 66 | Northern California Presbyterian Homes and Services | CA | 3 |
| 46 | Presbyterian Homes | IL | 3 |
| 67 | Presbyterian SeniorCare | PA | 3 |
| 74 | Air Force Villages | TX | 2 |
| 96 | Goodwin House Incorporated | VA | 2 |
| 31 | National Church Residences | OH | 2 |
| 30 | Concordia Lutheran Ministries | PA | 1 |
| 33 | Elim Care | MN | 1 |
| 56 | Friendship Senior Options | IL | 1 |
| 97 | Givens Estates Retirement Community | NC | 1 |
| 45 | Greencroft | IN | 1 |
| 37 | Hebrew SeniorLife | MA | 1 |
| 53 | Masonicare | CT | 1 |
| 2 | National Senior Campuses | MD | 1 |
| 23 | Shell Point | FL | 1 |
| Total Accredited Communities | | | 123 |

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

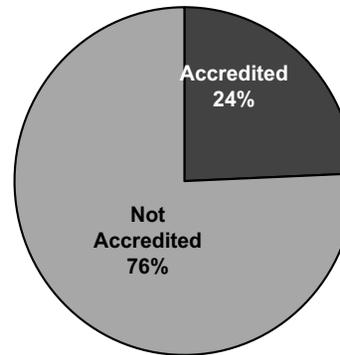
4-11 2013 LeadingAge Ziegler 100

Analysis of the Data: CARF-CCAC Accreditation

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



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



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

| Largest | Systems with an Accredited Community | (%) |
|---------|--------------------------------------|------|
| 10 | 10 | 100% |
| 25 | 25 | 100% |
| 50 | 27 | 54% |
| 100 | 27 | 27% |

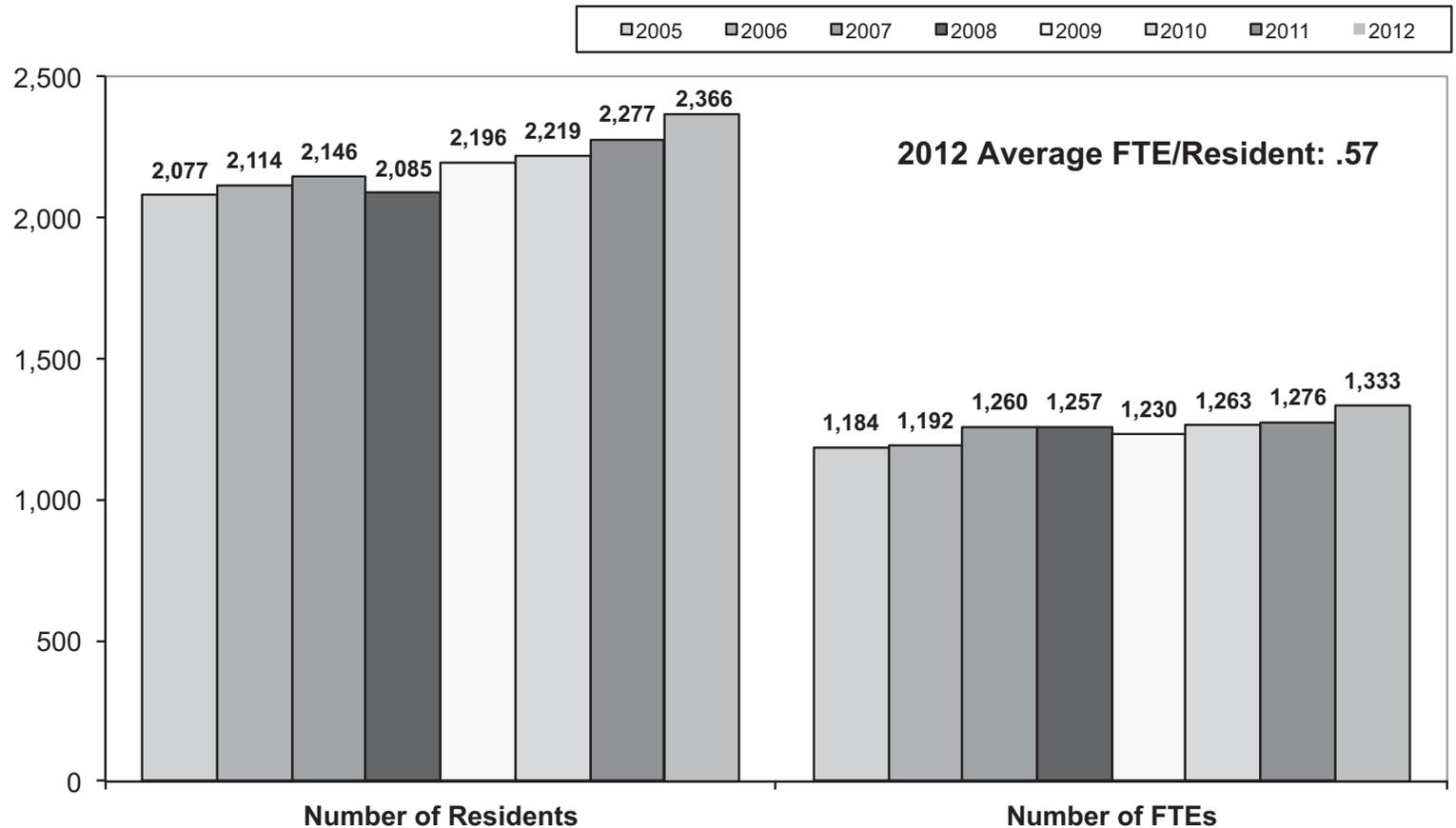
COMMUNITY CARF-CCAC ACCREDITATION (LARGEST 10, 25, 50, & TOTAL)

| Top | Accredited Communities | CCRCs | (%) |
|-----|------------------------|-------|-----|
| 10 | 91 | 107 | 85% |
| 25 | 121 | 150 | 81% |
| 50 | 123 | 319 | 39% |
| 100 | 123 | 506 | 24% |

4-12 2013 LeadingAge Ziegler 100

Analysis of the Data: Residents & Staffing

4-12a AVERAGE NUMBER OF RESIDENTS AND EMPLOYEES, 2005-2012



4-12 2013 LeadingAge Ziegler 100

Analysis of the Data: Residents & Staffing

4-12b SUMMARY OF RESIDENTS & UNITS, 2011-2012

| Analysis by Largest 10, 25, 50 & Total | | | | | | | |
|--|--------------------------------|-------|----------------------------|-------|----------------------------|------|--|
| Largest | Average Number of Residents | | Average Number of Units | | Average Resident / Unit | | |
| | 2012 | 2011 | 2012 | 2011 | 2012 | 2011 | |
| 10 | 9,533 | 9,417 | 7,321 | 7,325 | 1.48 | 1.45 | |
| 25 (n=24) | 5,376 | 5,365 | 4,465 | 4,541 | 1.20 | 1.17 | |
| 50 (n=48) | 3,620 | 3,478 | 3,025 | 3,050 | 1.05 | 1.09 | |
| 100 (n=94) | 2,366 | 2,284 | 2,017 | 2,048 | 0.95 | 1.06 | |

4-12c SUMMARY OF RESIDENTS & EMPLOYEES, 2011-2012

| Analysis by Largest 10, 25, 50 & Total | | | | | | | |
|--|--------------------------------|-------|---------------------------|-------|---------------------------|------|--|
| Largest | Average Number of Residents | | Average Number of FTEs | | Average FTE / Resident | | |
| | 2012 | 2011 | 2012 | 2011 | 2012 | 2011 | |
| 10 | 9,533 | 9,417 | 4,270 | 4,273 | 0.47 | 0.48 | |
| 25 (n=24) | 5,376 | 5,268 | 2,667 | 2,654 | 0.56 | 0.58 | |
| 50 (n=48) | 3,620 | 3,467 | 1,939 | 1,870 | 0.62 | 0.64 | |
| 100 (n=94) | 2,366 | 2,277 | 1,333 | 1,276 | 0.65 | 0.64 | |

| Analysis for 2013 LZ 100 by Year | | | |
|----------------------------------|-----------------------------------|---------------------------|---------------------------|
| Year | Average Number of Residents | Average Number of FTEs | Average FTE / Resident |
| 2009 avg FTE/resident n=97 | 2,196 | 1,230 | 0.65 |
| 2010 avg FTE/resident n=97 | 2,219 | 1,263 | 0.66 |
| 2011 avg FTE/resident n=96 | 2,277 | 1,276 | 0.64 |
| 2012 avg FTE/resident n=94 | 2,366 | 1,333 | 0.65 |

4-12 2013 LeadingAge Ziegler 100

Analysis of the Data: Residents & Staffing

4-12d CORPORATE STAFFING CHANGES

| 2013 Rank | System Name | State | Current (2013) | Previous |
|------------|--|-------|--------------------|------------------|
| CEO | | | | |
| 9 | Westminster Communities of Florida | FL | Roger Stevens | James Emerson |
| 80 | United Church Homes & Services | NC | Lee Syria | Doug Fleegle |
| 85 | VMP | WI | Alan Runde | James Enlund |
| CFO | | | | |
| 19 | Volunteers of America | VA | Joseph Budzynski | Tom Turnbull |
| 52 | Lutheran Services for the Aging | NC | Kirby Nickerson | Annette Conrad |
| 56 | Friendship Senior Options | IL | Michael A. Flynn | R. Kim Klockenga |
| 129 | Sunset Retirement Communities and Services | MI | Steve Zulderveen | Brenda Curtis |
| 192 | Three Pillars Senior Living Communities | WI | Jean Freuck | David Oines |
| COO | | | | |
| 2 | National Senior Campuses | MD | Debra Doyle | William Butz |
| 31 | National Church Residences | OH | Mark Ricketts | NONE |
| 35 | Springpoint Senior Living | NJ | Anthony Argondizza | James Vaccaro |
| 56 | Friendship Senior Options | IL | Benjamin Gilchrist | NONE |
| 58 | Virginia Baptist Homes | VA | NONE | Benjamin Decker |
| 59 | Virginia United Methodist Homes | VA | Daniel Oetzel | NONE |
| 76 | United Church Homes | OH | Chuck Mooney | Pam White |
| 80 | United Church Homes & Services | NC | NONE | Lee Syria |

4-12e AVERAGE CORPORATE TENURES

| Position | Average Tenure (years) | n* |
|----------|------------------------|-----|
| CEO** | 10.83 | 100 |
| CFO | 8.58 | 97 |
| COO | 4.12 | 77 |

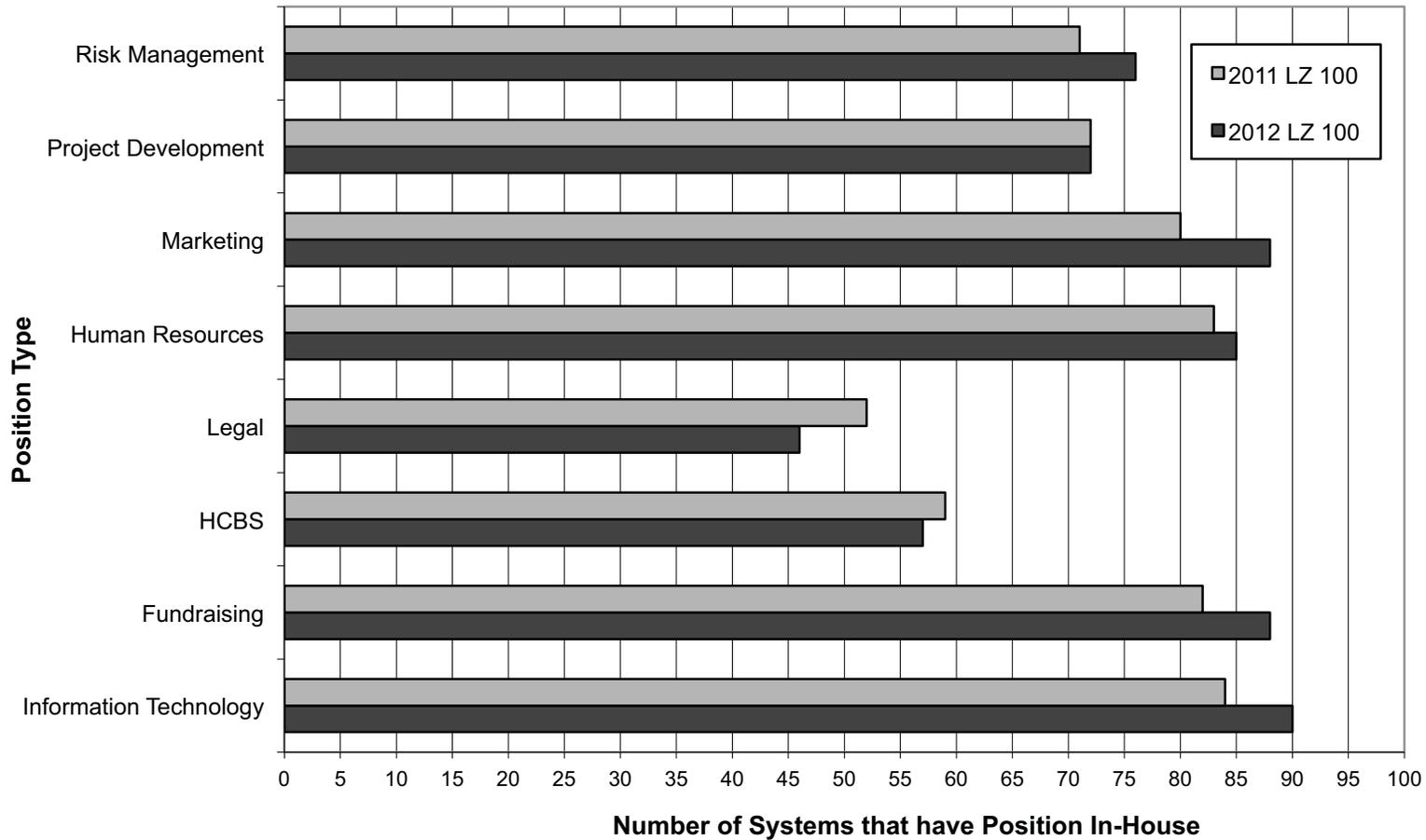
* n represents the number of systems that have that position and the position is filled.

** 9 systems have CEOs who served on their organization's board prior to becoming CEO

4-12 2013 LeadingAge Ziegler 100

Analysis of the Data: Residents & Staffing

4-12f COMPARISON OF IN-HOUSE CORPORATE POSITIONS



4-13 2013 LeadingAge Ziegler 100

Analysis of the Data: Foundings

4-13a 2013 RANK, DETAILED BY YEAR FOUNDED

| 2013 Rank | System Name | State | Year Founded |
|-----------|--|-------|--------------|
| 10 | Lutheran Senior Services | MO | 1858 |
| 18 | Ecumen | MN | 1862 |
| 92 | Simpson Senior Services | PA | 1865 |
| 21 | Diakon Lutheran Social Ministries | PA | 1868 |
| 91 | St. Ann's Community | NY | 1873 |
| 30 | Concordia Lutheran Ministries | PA | 1881 |
| 22 | Masonic Villages | PA | 1884 |
| 5 | Covenant Retirement Communities | IL | 1886 |
| 73 | Wesley Enhanced Living | PA | 1888 |
| 40 | Bethesda Health Group, Inc.* | MO | 1889 |
| 53 | Masonicare | CT | 1889 |
| 47 | Holland Home | MI | 1892 |
| 54 | Lutheran Life Communities | IL | 1892 |
| 70 | Lutheran Homes of South Carolina | SC | 1892 |
| 26 | Franciscan Communities | IL | 1894 |
| 19 | Volunteers of America | VA | 1896 |
| 27 | Augustana Care Corporation | MN | 1896 |
| 37 | Hebrew SeniorLife | MA | 1903 |
| 57 | Phoebe Ministries | PA | 1903 |
| 61 | Lutheran SeniorLife | PA | 1904 |
| 98 | Elder Care Alliance | CA | 1906 |
| 100 | Western Home Communities | IA | 1906 |
| 72 | United Methodist Homes of New Jersey | NJ | 1907 |
| 89 | Westminster Ingleside Retirement Communities | DC | 1907 |
| 17 | Front Porch | CA | 1908 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

| 2013 Rank | System Name | State | Year Founded |
|-----------|---|-------|--------------|
| 83 | United Methodist Memorial Home | IN | 1910 |
| 28 | Otterbein Senior Lifestyle Choices | OH | 1912 |
| 65 | Los Angeles Jewish Home for the Aged* | CA | 1912 |
| 48 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 1913 |
| 46 | Presbyterian Homes | IL | 1914 |
| 35 | Springpoint Senior Living | NJ | 1916 |
| 93 | Living Branches | PA | 1917 |
| 76 | United Church Homes | OH | 1920 |
| 1 | Evangelical Lutheran Good Samaritan Society | SD | 1922 |
| 12 | Ohio Presbyterian Retirement Services | OH | 1922 |
| 85 | VMP | WI | 1925 |
| 15 | Asbury Communities | MD | 1926 |
| 36 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 1926 |
| 11 | Presbyterian Senior Living | PA | 1927 |
| 33 | Elim Care | MN | 1927 |
| 32 | The Eddy | NY | 1928 |
| 67 | Presbyterian SeniorCare | PA | 1928 |
| 60 | American Baptist Homes of the Midwest* | MN | 1930 |
| 34 | Homewood Retirement Centers | MD | 1932 |
| 84 | Mather LifeWays | IL | 1941 |
| 58 | Virginia Baptist Homes | VA | 1945 |
| 59 | Virginia United Methodist Homes, Inc. | VA | 1945 |
| 69 | Presbyterian Villages of Michigan | MI | 1945 |
| 78 | The Presbyterian Homes, Inc. of North Carolina | NC | 1946 |
| 50 | WesleyLife | IA | 1947 |

* No data received from provider for current reporting year

** NR: Not Ranked in that year

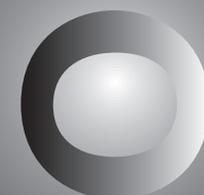
4-13 2013 LeadingAge Ziegler 100

Analysis of the Data: Foundings

4-13a 2013 RANK, DETAILED BY YEAR FOUNDED

| 2013 Rank | System Name | State | Year Founded | 2013 Rank | System Name | State | Year Founded |
|-----------|--|-------|--------------|-----------|---|-------|--------------|
| 88 | Christian Care Centers | TX | 1947 | 52 | Lutheran Services for the Aging | NC | 1962 |
| 20 | Presbyterian Manors of Mid-America | KS | 1948 | 90 | Presbyterian Communities and Services | TX | 1962 |
| 86 | Oakwood Lutheran Senior Ministries | WI | 1948 | 42 | Magnolia Manor, Inc.* | GA | 1963 |
| 13 | Cornerstone Affiliates | CA | 1949 | 74 | Air Force Villages | TX | 1964 |
| 95 | Luthercare | PA | 1949 | 82 | Menno Haven | PA | 1964 |
| 63 | Lutheran Social Services of South Central Pennsylvania | PA | 1951 | 41 | Episcopal Senior Communities | CA | 1965 |
| 4 | Presbyterian Homes and Services | MN | 1953 | 49 | Mississippi Methodist Senior Services | MS | 1966 |
| 87 | Cedar Community | WI | 1953 | 64 | Sears Methodist Retirement System, Inc. | TX | 1966 |
| 9 | Westminster Communities of Florida | FL | 1954 | 45 | Greencroft | IN | 1967 |
| 44 | Buckner Retirement Services, Inc. | TX | 1954 | 39 | Eskaton | CA | 1968 |
| 94 | Presbyterian Communities of South Carolina | SC | 1954 | 8 | The Kendal Corporation | PA | 1971 |
| 43 | be.group | CA | 1955 | 3 | ACTS Retirement-Life Communities, Inc. | PA | 1972 |
| 79 | Presby's Inspired Life | PA | 1955 | 56 | Friendship Senior Options | IL | 1974 |
| 96 | Goodwin House Incorporated | VA | 1955 | 62 | EMA, Inc. | MD | 1974 |
| 25 | Providence Life Services | IL | 1956 | 97 | Givens Estates Retirement Community | NC | 1975 |
| 23 | Shell Point | FL | 1958 | 7 | Lifespace Communities, Inc. | IA | 1976 |
| 51 | Baptist Village Retirement Communities of Oklahoma | OK | 1958 | 81 | United Methodist Retirement Homes, Inc. | NC | 1977 |
| 66 | Northern California Presbyterian Homes and Services | CA | 1958 | 29 | Christian Care Companies | AZ | 1979 |
| 68 | United Methodist Homes | NY | 1958 | 24 | Willow Valley Retirement Communities | PA | 1982 |
| 6 | Retirement Housing Foundation | CA | 1961 | 71 | Walker Methodist | MN | 1982 |
| | | | | 75 | Elant | NY | 1983 |
| | | | | 77 | SantaFe Senior Living | FL | 1986 |
| | | | | 55 | Bethesda Senior Living Communities | CO | 1990 |

LeadingAge

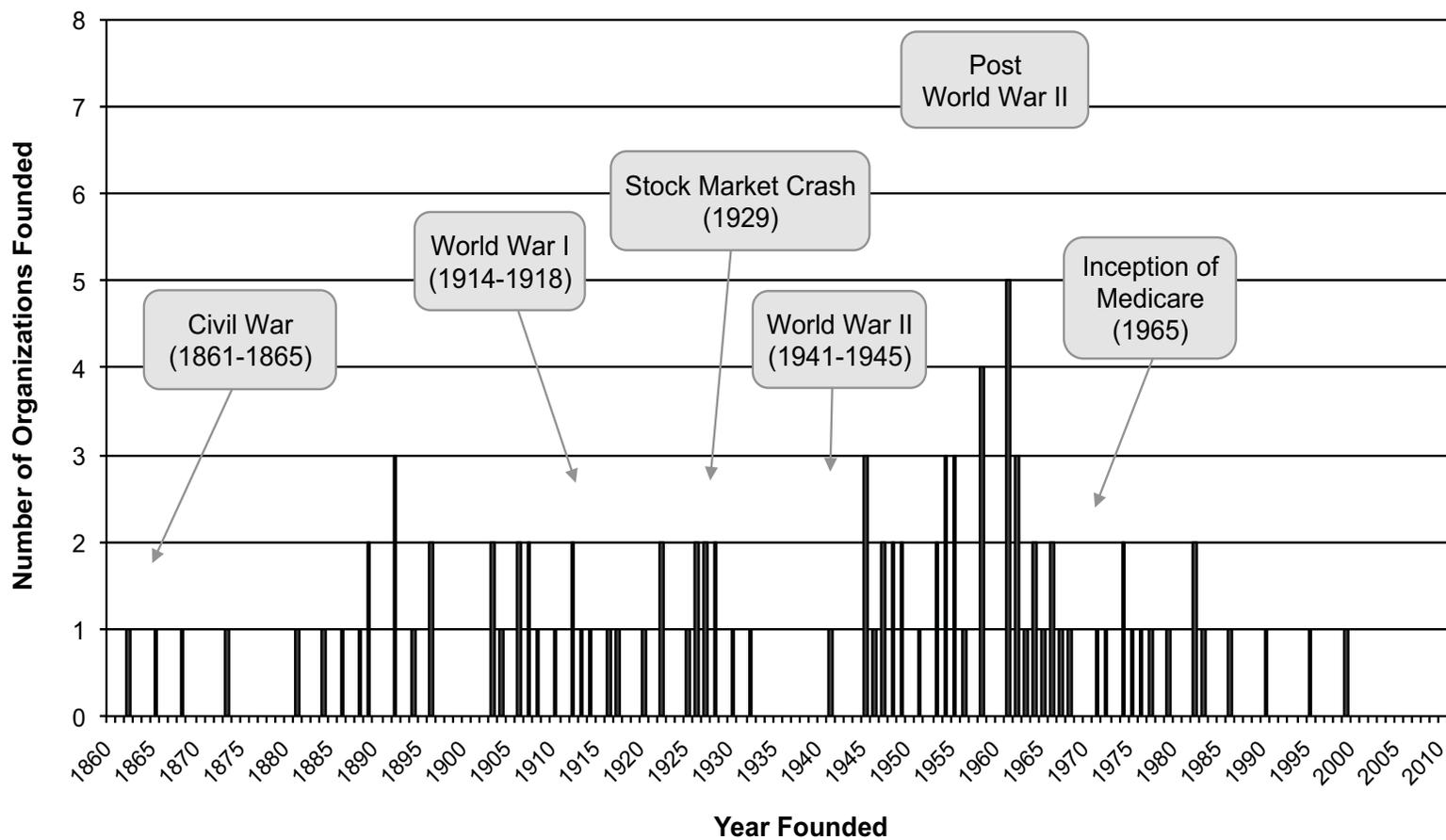


Ziegler

4-13 2013 LeadingAge Ziegler 100

Analysis of the Data: Foundings

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



4-14 2013 LeadingAge Ziegler 100

Analysis of the Data: Affiliations

4-14a 2013 RANK, DETAILED BY AFFILIATION

| 2013 Rank | System Name | State | Affiliation | 2013 Rank | System Name | State | Affiliation |
|-----------|---|-------|-----------------------------------|-----------|---|-------|----------------------------|
| 1 | Evangelical Lutheran Good Samaritan Society | SD | Lutheran | 26 | Franciscan Communities | IL | Catholic |
| 2 | National Senior Campuses | MD | none | 27 | Augustana Care Corporation | MN | Lutheran |
| 3 | ACTS Retirement-Life Communities, Inc. | PA | Christian | 28 | Otterbein Senior Lifestyle Choices | OH | Methodist |
| 4 | Presbyterian Homes and Services | MN | Presbyterian | 29 | Christian Care Companies | AZ | Christian |
| 5 | Covenant Retirement Communities | IL | Evangelical Covenant | 30 | Concordia Lutheran Ministries | PA | Lutheran |
| 6 | Retirement Housing Foundation | CA | United Church of Christ | 31 | National Church Residences | OH | Presbyterian |
| 7 | Lifespace Communities, Inc. | IA | none | 32 | The Eddy | NY | none |
| 8 | The Kendal Corporation | PA | Quaker | 33 | Elim Care | MN | Evangelical Free |
| 9 | Westminster Communities of Florida | FL | Presbyterian | 34 | Homewood Retirement Centers | MD | United Church of Christ |
| 10 | Lutheran Senior Services | MO | Lutheran | 35 | Springpoint Senior Living | NJ | Presbyterian |
| 11 | Presbyterian Senior Living | PA | Presbyterian | 36 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | Catholic |
| 12 | Ohio Presbyterian Retirement Services | OH | Presbyterian | 37 | Hebrew SeniorLife | MA | Jewish |
| 13 | Cornerstone Affiliates | CA | Baptist | 38 | Senior Quality Lifestyles Corporation | TX | none |
| 14 | Pacific Retirement Services, Inc. | OR | Presbyterian Influenced | 39 | Eskaton | CA | Disciples of Christ Church |
| 15 | Asbury Communities | MD | Methodist | 40 | Bethesda Health Group, Inc.* | MO | none |
| 16 | Christian Homes, Inc. | IL | Christian | 41 | Episcopal Senior Communities | CA | Episcopal |
| 17 | Front Porch | CA | Lutheran | 42 | Magnolia Manor, Inc.* | GA | Methodist |
| 18 | Ecumen | MN | Lutheran | 43 | be.group | CA | Presbyterian |
| 19 | Volunteers of America | VA | none | 44 | Buckner Retirement Services, Inc. | TX | Baptist |
| 20 | Presbyterian Manors of Mid-America | KS | Presbyterian | 45 | Greencroft | IN | Mennonite |
| 21 | Diakon Lutheran Social Ministries | PA | Lutheran | 46 | Presbyterian Homes | IL | Presbyterian |
| 22 | Masonic Villages | PA | Fraternal | 47 | Holland Home | MI | Dutch Reformed |
| 23 | Shell Point | FL | Christian and Missionary Alliance | 48 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | Catholic |
| 24 | Willow Valley Retirement Communities | PA | none | 49 | Mississippi Methodist Senior Services | MS | Methodist |
| 25 | Providence Life Services | IL | Dutch Reformed | 50 | WesleyLife | IA | Methodist |

* No data received from provider for current reporting year

4-14 2013 LeadingAge Ziegler 100

Analysis of the Data: Affiliations

4-14a 2013 RANK, DETAILED BY AFFILIATION

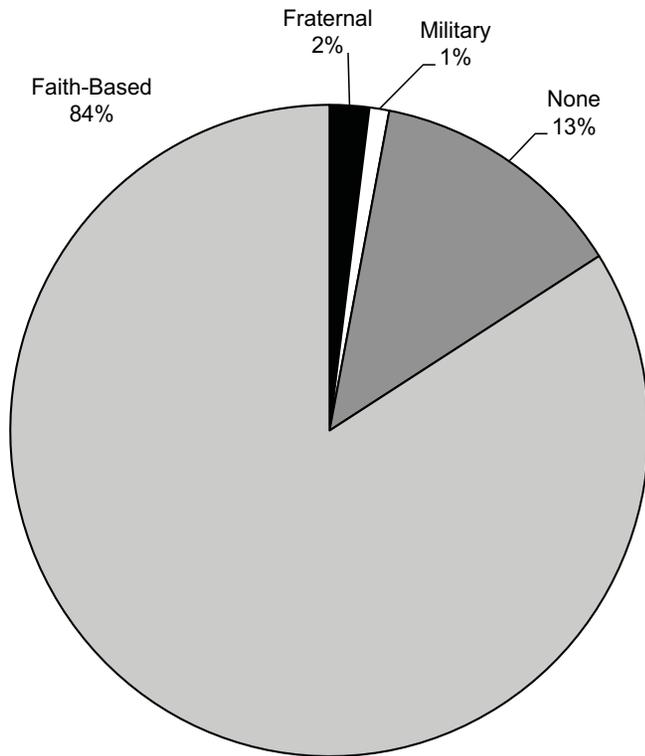
| 2013 Rank | System Name | State | Affiliation | 2013 Rank | System Name | State | Affiliation |
|-----------|--|-------|-------------------------|-----------|--|-------|-------------------------|
| 51 | Baptist Village Retirement Communities of Oklahoma | OK | Baptist | 76 | United Church Homes | OH | United Church of Christ |
| 52 | Lutheran Services for the Aging | NC | Lutheran | 77 | SantaFe Senior Living | FL | none |
| 53 | Masonicare | CT | Fraternal | 78 | The Presbyterian Homes, Inc. of North Carolina | NC | Presbyterian |
| 54 | Lutheran Life Communities | IL | Lutheran | 79 | Presby's Inspired Life | PA | Presbyterian |
| 55 | Bethesda Senior Living Communities | CO | Ecumenical | 80 | United Church Homes & Services | NC | United Church of Christ |
| 56 | Friendship Senior Options | IL | none | 81 | United Methodist Retirement Homes, Inc. | NC | Methodist |
| 57 | Phoebe Ministries | PA | United Church of Christ | 82 | Menno Haven | PA | Mennonite |
| 58 | Virginia Baptist Homes | VA | Baptist | 83 | United Methodist Memorial Home | IN | Methodist |
| 59 | Virginia United Methodist Homes, Inc. | VA | Methodist | 84 | Mather LifeWays | IL | none |
| 60 | American Baptist Homes of the Midwest* | MN | Baptist | 85 | VMP | WI | none |
| 61 | Lutheran SeniorLife | PA | Lutheran | 86 | Oakwood Lutheran Senior Ministries | WI | Lutheran |
| 62 | EMA, Inc. | MD | Episcopal | 87 | Cedar Community | WI | United Church of Christ |
| 63 | Lutheran Social Services of South Central Pennsylvania | PA | Lutheran | 88 | Christian Care Centers | TX | Christian |
| 64 | Sears Methodist Retirement System, Inc. | TX | Methodist | 89 | Westminster Ingleside Retirement Communities | DC | Presbyterian |
| 65 | Los Angeles Jewish Home for the Aged* | CA | Jewish | 90 | Presbyterian Communities and Services | TX | Presbyterian |
| 66 | Northern California Presbyterian Homes and Services | CA | Presbyterian | 91 | St. Ann's Community | NY | Catholic |
| 67 | Presbyterian SeniorCare | PA | Presbyterian | 92 | Simpson Senior Services | PA | Methodist |
| 68 | United Methodist Homes | NY | Methodist | 93 | Living Branches | PA | Mennonite |
| 69 | Presbyterian Villages of Michigan | MI | Presbyterian | 94 | Presbyterian Communities of South Carolina | SC | Presbyterian |
| 70 | Lutheran Homes of South Carolina | SC | Lutheran | 95 | LutherCare | PA | Lutheran |
| 71 | Walker Methodist | MN | Methodist | 96 | Goodwin House Incorporated | VA | Episcopal |
| 72 | United Methodist Homes of New Jersey | NJ | Methodist | 97 | Givens Estates Retirement Community | NC | United Methodist |
| 73 | Wesley Enhanced Living | PA | Methodist | 98 | Elder Care Alliance | CA | Ecumenical |
| 74 | Air Force Villages | TX | Military | 99 | Western Home Communities | IA | none |
| 75 | Elant | NY | none | 100 | Morningside Ministries | TX | Ecumenical |

* No data received from provider for current reporting year

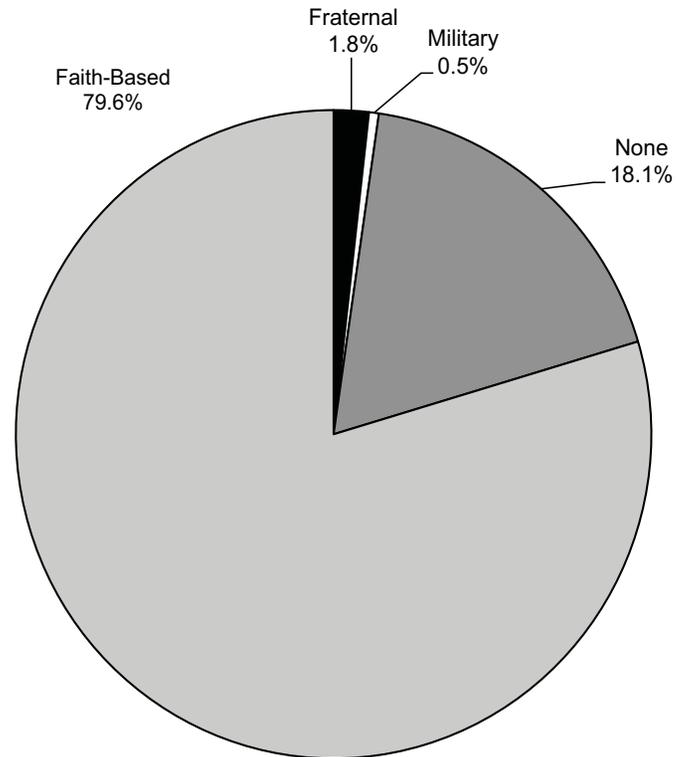
4-14 2013 LeadingAge Ziegler 100

Analysis of the Data: Affiliations

4-14b AFFILIATION BY TOTAL NUMBER OF SYSTEMS



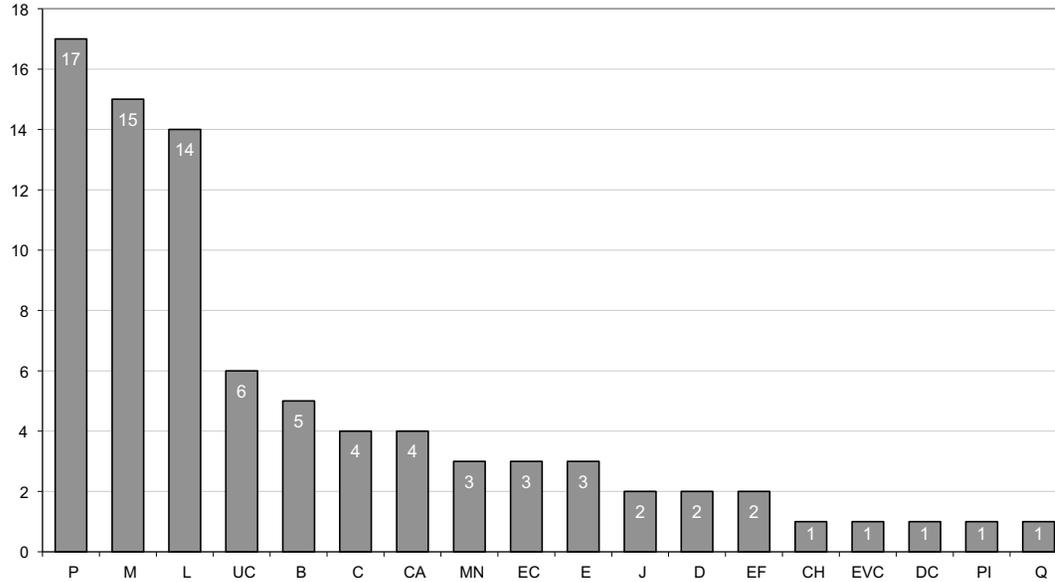
4-14c AFFILIATION BY TOTAL NUMBER OF UNITS



4-14 2013 LeadingAge Ziegler 100

Analysis of the Data: Affiliations

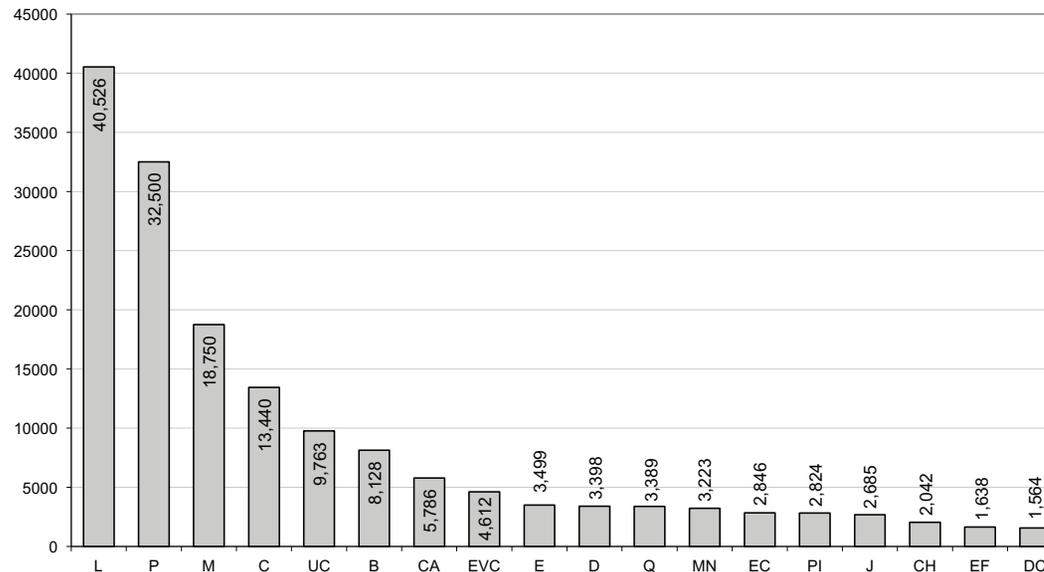
4-14d FAITH-BASED AFFILIATIONS, BY TOTAL NUMBER OF SYSTEMS



Religions

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

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



4-15 2013 LeadingAge Ziegler 100

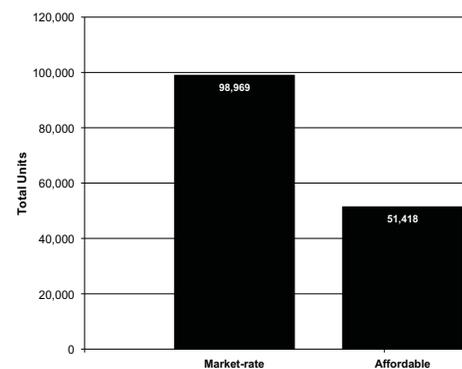
Analysis of the Data: Affordable Housing

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

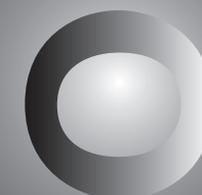
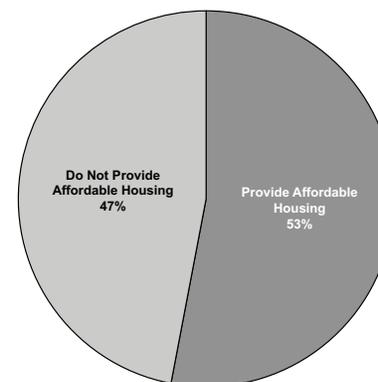
| Rank | 2013 LZ 100 Rank | System Name | State | Units | Communities* |
|------|------------------|---|-------|--------|--------------|
| 20 | 31 | National Church Residences | OH | 16,274 | 228 |
| 3 | 6 | Retirement Housing Foundation | CA | 10,092 | 28 |
| 14 | 19 | Volunteers of America | VA | 9,804 | 160 |
| 45 | 76 | United Church Homes | OH | 2,070 | 49 |
| 4 | 9 | Westminster Communities of Florida | FL | 2,032 | 28 |
| 28 | 43 | be.group | CA | 1,716 | 26 |
| 22 | 35 | Springpoint Senior Living | NJ | 1,712 | 17 |
| 8 | 13 | Cornerstone Affiliates | CA | 1,701 | 22 |
| 41 | 69 | Presbyterian Villages of Michigan | MI | 1,326 | 17 |
| 1 | 1 | Evangelical Lutheran Good Samaritan Society | SD | 1,203 | 28 |
| 47 | 79 | Presby's Inspired Life | PA | 1,133 | 13 |
| 9 | 14 | Pacific Retirement Services, Inc. | OR | 1,095 | 24 |
| 40 | 67 | Presbyterian SeniorCare | PA | 970 | 22 |
| 24 | 37 | Hebrew SeniorLife | MA | 766 | 2 |
| 26 | 41 | Episcopal Senior Communities | CA | 621 | 4 |
| 13 | 18 | Ecumen | MN | 501 | 4 |
| 39 | 66 | Northern California Presbyterian Homes and Services | CA | 418 | 3 |
| 6 | 11 | Presbyterian Senior Living | PA | 414 | 6 |
| 5 | 10 | Lutheran Senior Services | MO | 392 | 6 |
| 34 | 57 | Phoebe Ministries | PA | 356 | 8 |
| 29 | 45 | Greencroft | IN | 352 | 2 |
| 15 | 21 | Diakon Lutheran Social Ministries | PA | 335 | 3 |
| 32 | 49 | Mississippi Methodist Senior Services | MS | 313 | 0 |
| 43 | 72 | United Methodist Homes of New Jersey | NJ | 300 | 5 |
| 2 | 4 | Presbyterian Homes and Services | MN | 297 | 3 |
| 18 | 27 | Augustana Care Corporation | MN | 271 | 0 |
| 19 | 29 | Christian Care Companies | AZ | 247 | 1 |
| 53 | 97 | Givens Estates Retirement Community | NC | 178 | 1 |
| 44 | 73 | Wesley Enhanced Living | PA | 162 | 3 |
| 7 | 12 | Ohio Presbyterian Retirement Services | OH | 150 | 0 |
| 48 | 80 | United Church Homes & Services | NC | 150 | 5 |
| 10 | 15 | Asbury Communities | MD | 149 | 1 |
| 38 | 64 | Sears Methodist Retirement System, Inc. | TX | 149 | 2 |
| 27 | 42 | Magnolia Manor, Inc. | GA | 144 | 0 |
| 17 | 26 | Franciscan Communities | IL | 139 | 3 |
| 42 | 71 | Walker Methodist | MN | 139 | 3 |
| 23 | 36 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 134 | 4 |
| 30 | 46 | Presbyterian Homes | IL | 109 | 3 |
| 37 | 63 | Lutheran Social Services of South Central Pennsylvania | PA | 107 | 0 |
| 12 | 17 | Front Porch | CA | 100 | 0 |
| 52 | 93 | Living Branches | PA | 100 | 0 |
| 35 | 60 | American Baptist Homes of the Midwest | MN | 90 | 0 |
| 16 | 25 | Providence Life Services | IL | 81 | 1 |
| 51 | 92 | Simpson Senior Services | PA | 81 | 2 |
| 25 | 39 | Eskaton | CA | 80 | 0 |
| 31 | 48 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 75 | 1 |
| 36 | 61 | Lutheran SeniorLife | PA | 55 | 0 |
| 33 | 52 | Lutheran Services for the Aging | NC | 50 | 1 |
| 21 | 33 | Elim Care | MN | 48 | 1 |
| 50 | 86 | Oakwood Lutheran Senior Ministries | WI | 30 | 0 |
| 49 | 81 | United Methodist Retirement Homes, Inc. | NC | 24 | 1 |
| 11 | 16 | Christian Homes, Inc. | IL | 21 | 0 |
| 46 | 78 | The Presbyterian Homes, Inc. of North Carolina | NC | 2 | 0 |

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

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



4-15c PERCENTAGE OF LZ 100 PROVIDING HOUSING



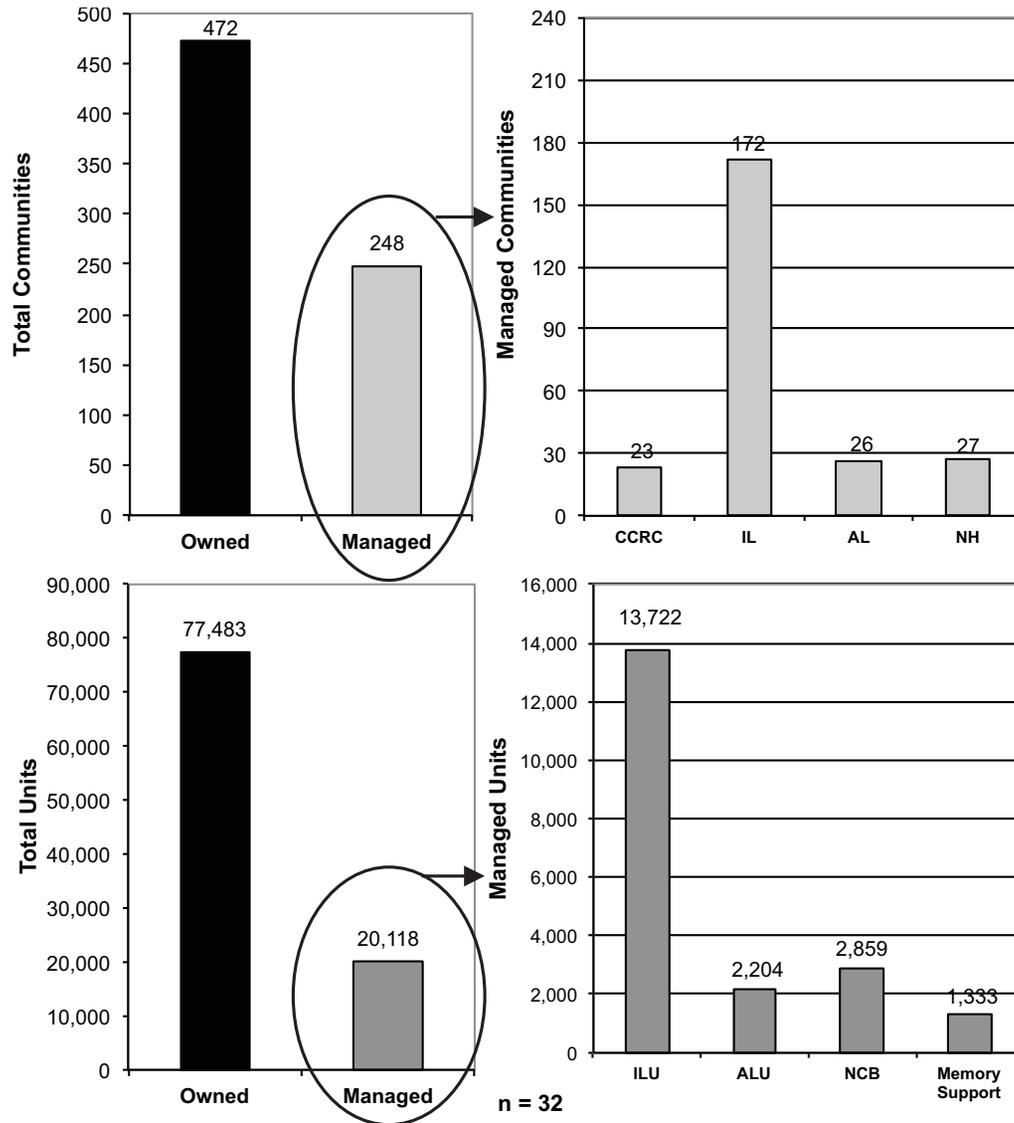
4-16 2013 LeadingAge Ziegler 100

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

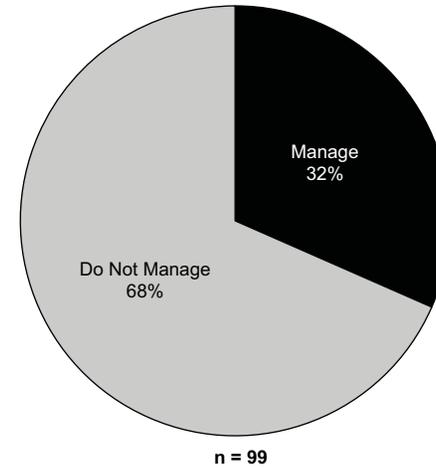
| Rank | 2013 LZ 100 Rank | System Name | State | Managed-only | |
|------|------------------|---|-------|--------------|-------------|
| | | | | Units | Communities |
| 1 | 31 | National Church Residences | OH | 4160 | 61 |
| 2 | 67 | Presbyterian SeniorCare | PA | 1780 | 35 |
| 3 | 17 | Front Porch | CA | 1664 | 25 |
| 4 | 13 | Cornerstone Affiliates | CA | 1586 | 19 |
| 5 | 6 | Retirement Housing Foundation | CA | 1374 | 4 |
| 6 | 14 | Pacific Retirement Services, Inc. | OR | 1080 | 4 |
| 7 | 18 | Ecumen | MN | 982 | 21 |
| 8 | 35 | Springpoint Senior Living | NJ | 931 | 8 |
| 9 | 79 | Presby's Inspired Life | PA | 862 | 12 |
| 10 | 15 | Asbury Communities | MD | 630 | 3 |
| 11 | 16 | Christian Homes, Inc. | IL | 549 | 2 |
| 12 | 64 | Sears Methodist Retirement System, Inc. | TX | 480 | 3 |
| 13 | 76 | United Church Homes | OH | 459 | 3 |
| 14 | 1 | Evangelical Lutheran Good Samaritan Society | SD | 448 | 8 |
| 15 | 27 | Augustana Care Corporation | MN | 414 | 7 |
| 16 | 39 | Eskaton | CA | 405 | 4 |
| 17 | 25 | Providence Life Services | IL | 346 | 1 |
| 18 | 4 | Presbyterian Homes and Services | MN | 331 | 4 |
| 19 | 5 | Covenant Retirement Communities | IL | 276 | 1 |
| 20 | 72 | United Methodist Homes of New Jersey | NJ | 240 | 4 |
| 21 | 10 | Lutheran Senior Services | MO | 208 | 3 |
| 22 | 96 | Goodwin House Incorporated | VA | 161 | 1 |
| 23 | 81 | United Methodist Retirement Homes, Inc. | NC | 155 | 1 |
| 24 | 45 | Greencroft | IN | 144 | 3 |
| 25 | 54 | Lutheran Life Communities | IL | 105 | 1 |
| 26 | 66 | Northern California Presbyterian Homes and Services | CA | 94 | 4 |
| 27 | 26 | Franciscan Communities | IL | 85 | 1 |
| 28 | 100 | Western Home Communities | IA | 75 | 2 |
| 29 | 80 | United Church Homes & Services | NC | 72 | 2 |
| 30 | 69 | Presbyterian Villages of Michigan | MI | 22 | 1 |

4-16 2013 LeadingAge Ziegler 100

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

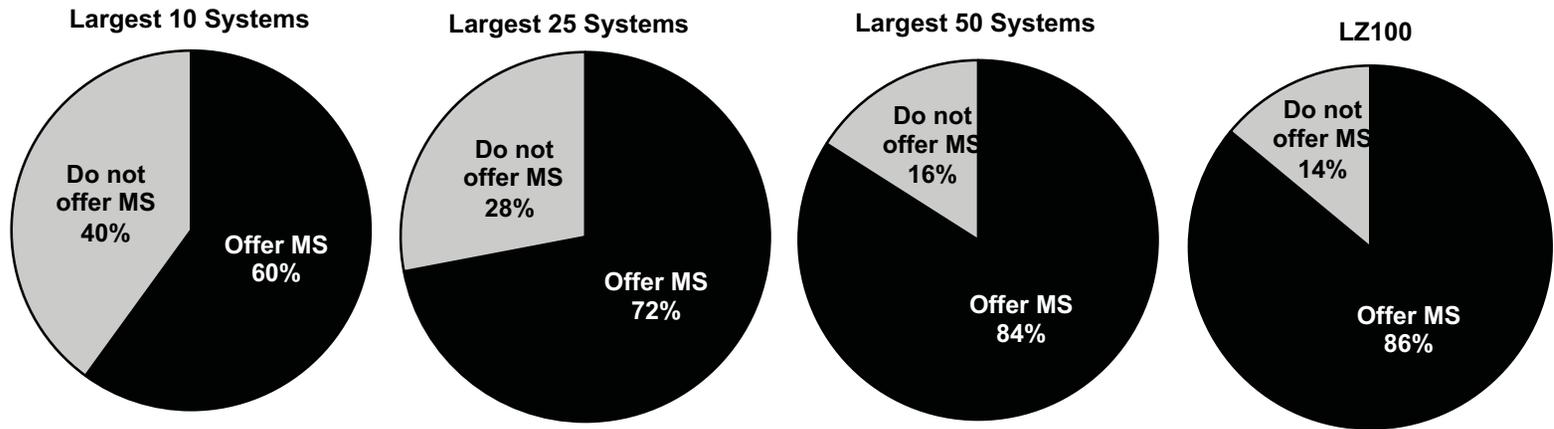


4-16c PERCENTAGE OF LZ 100 THAT MANAGE

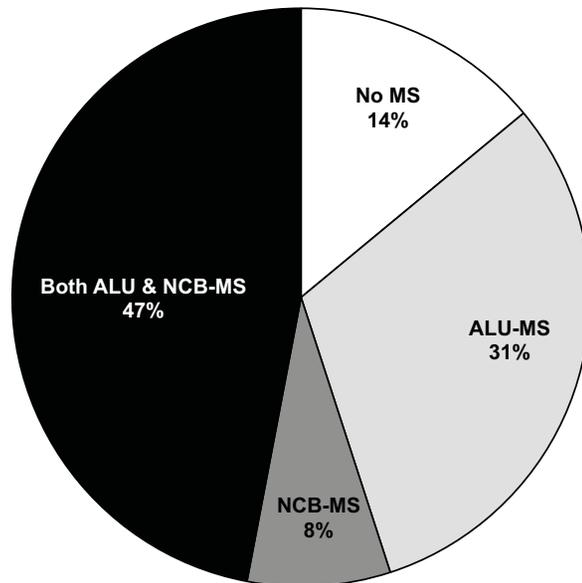


4-17 2013 LeadingAge Ziegler 100

4-17a PERCENTAGE OF LZ 100 THAT OFFER MS

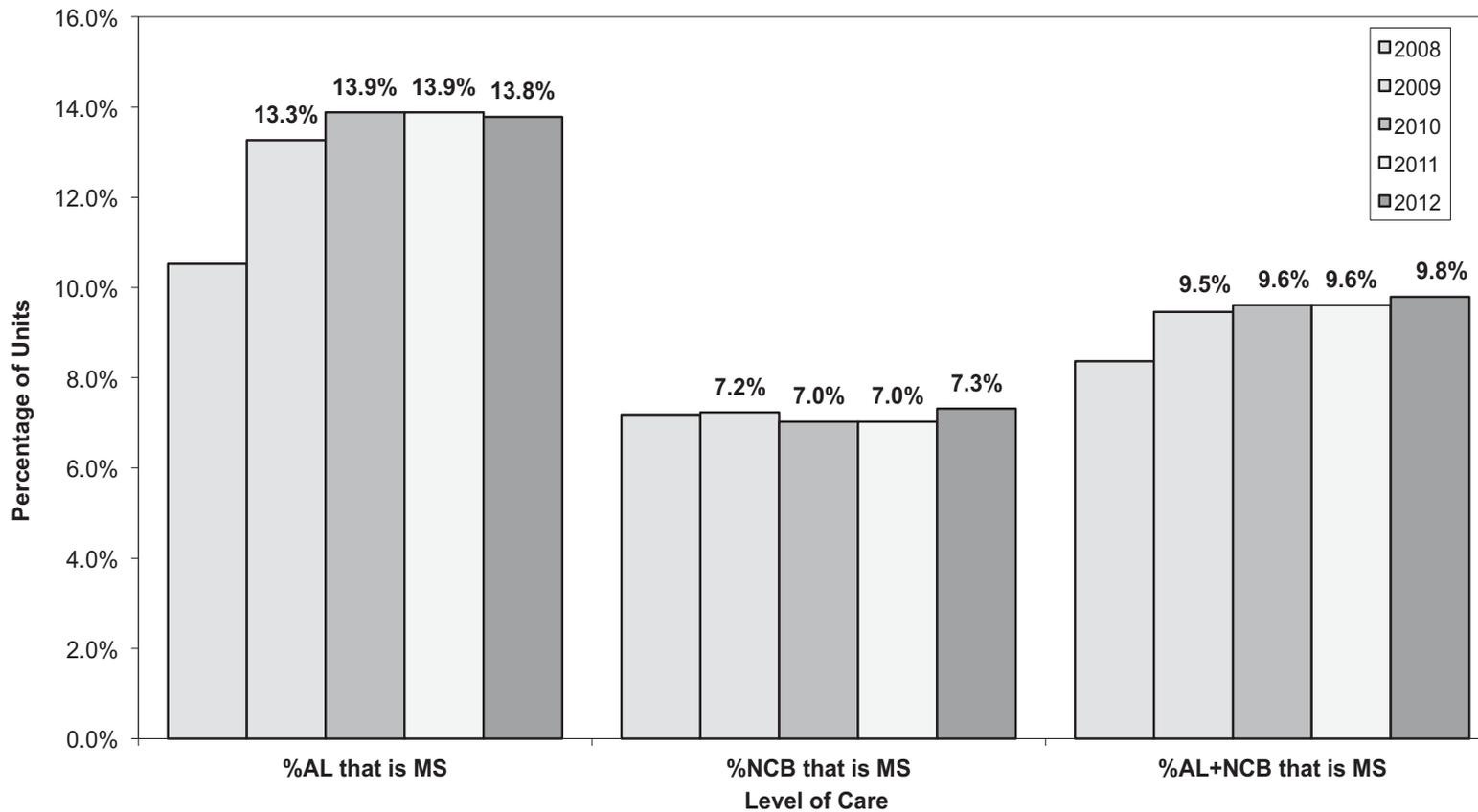


4-17b PERCENTAGE OF MS UNITS, BY LEVEL OF CARE



4-17 2013 LeadingAge Ziegler 100

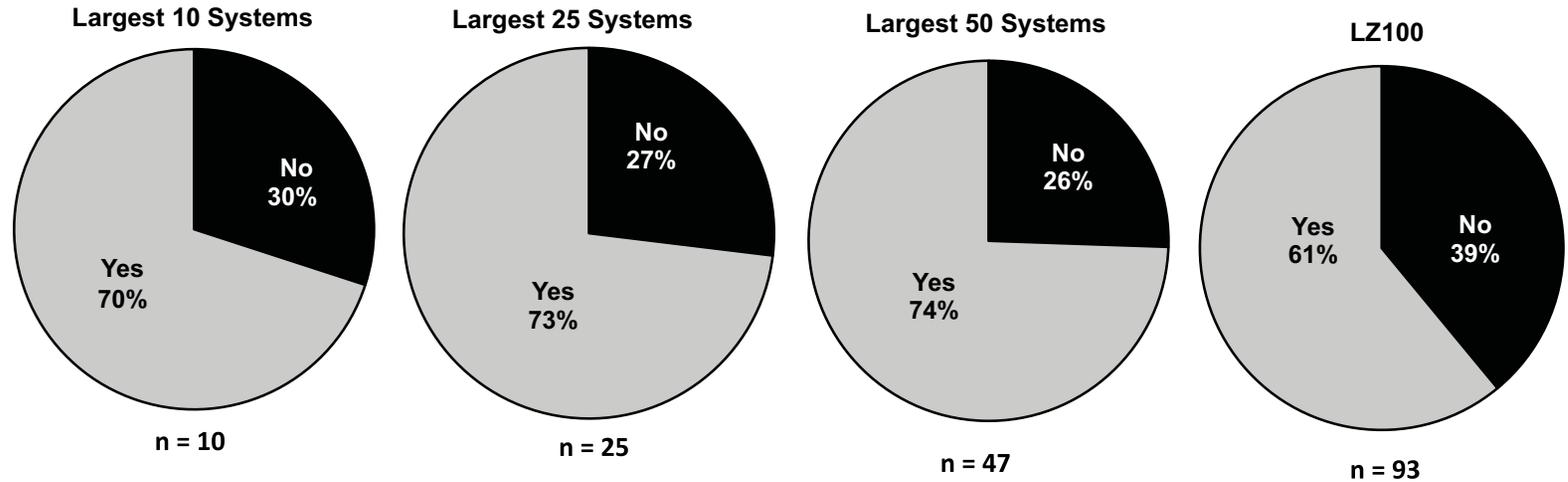
4-17c 2013 LZ 100 MS UNITS AS A PERCENTAGE OF ALL UNITS, BY LEVEL OF CARE, 2008-2012



4-18 2013 LeadingAge Ziegler 100

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

4-18a PERCENTAGE OF LZ 100 THAT OFFER HCBS



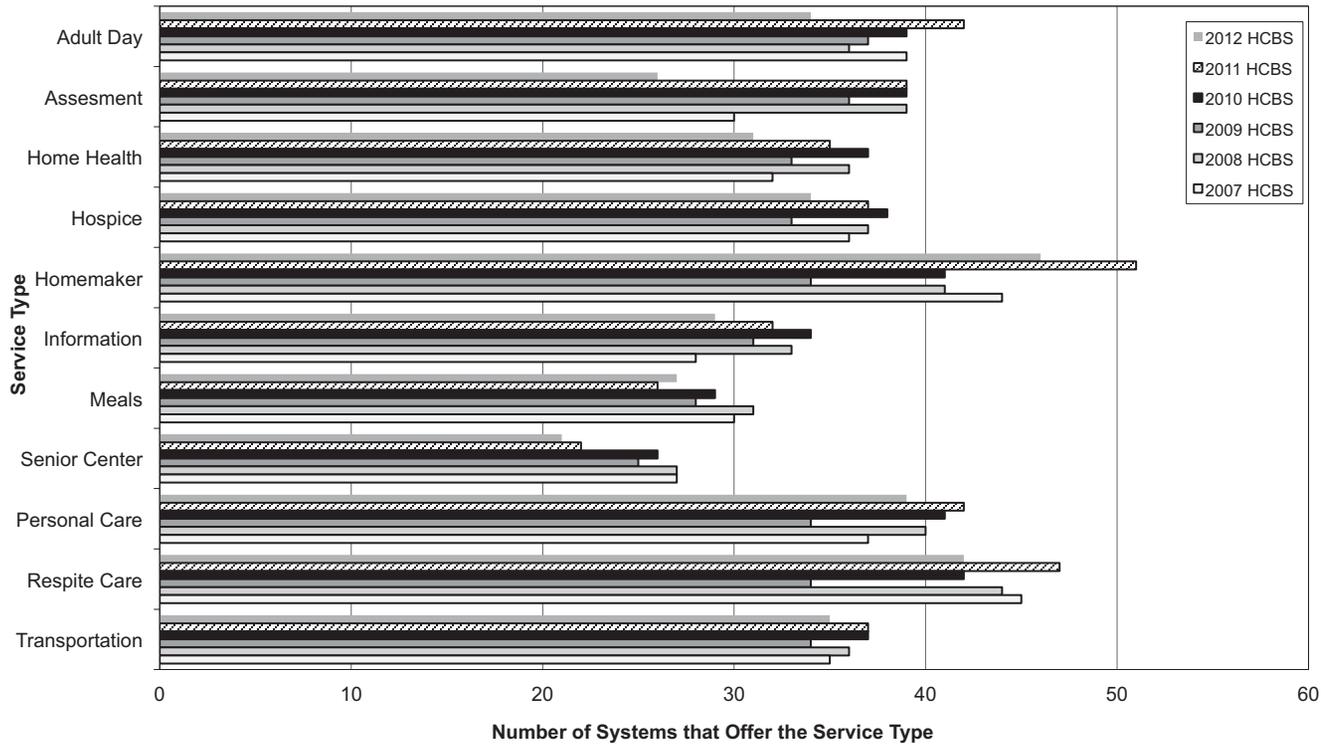
4-18b COMPARISON OF ORGANIZATIONS' AGE AND PROVISIONS OF HCBS

| Largest | Average Age of HCBS Providers (years) | Average Age of Non-HCBS Providers (years) |
|---------|---------------------------------------|---|
| 10 | 80 | 34 |
| 25 | 90 | 42 |
| 50 | 85 | 46 |
| 100 | 81 | 63 |

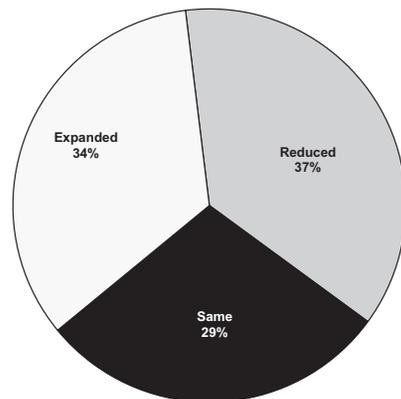
4-18 2013 LeadingAge Ziegler 100

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

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



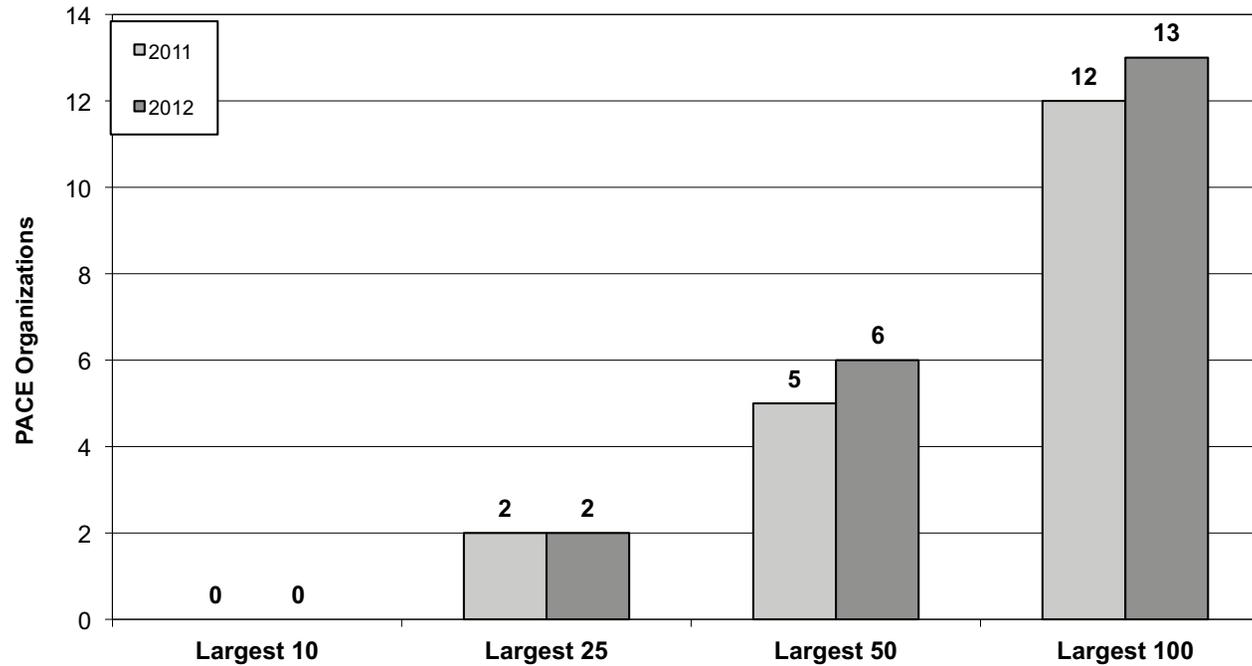
4-18d LZ 100 THAT EXPANDED OR REDUCED TYPES OF HCBS SERVICES OFFERED IN 2012



4-19 2013 LeadingAge Ziegler 100

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

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



4-19b COMPARISON OF PACE LOCATIONS AND ENROLLEES

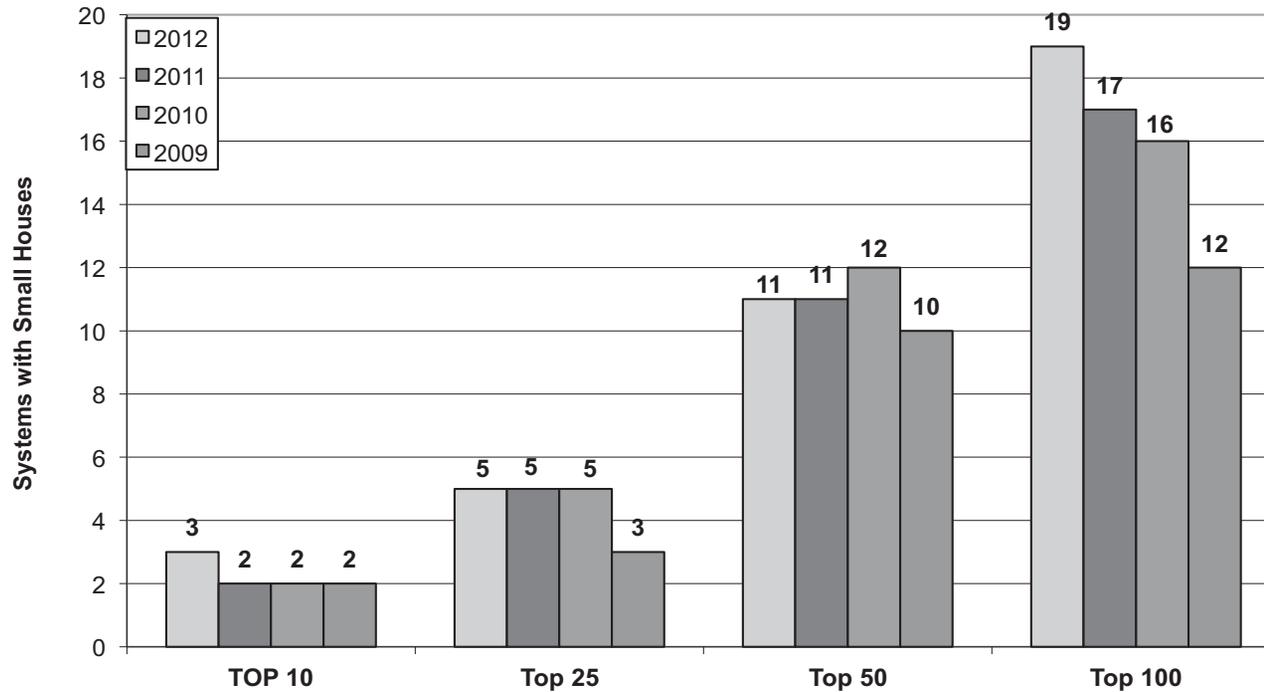
| | Total PACE Locations | Total Number of Enrollees |
|-----------------------|----------------------|---------------------------|
| Largest 10 (n=0) | 0 | 0 |
| Largest 25 (n=2) | 5 | 425 |
| Largest 50 (n=6) | 10 | 1245 |
| Largest 100 (n=13) | 23 | 2,311 |

*Two organizations did not provide its total number of PACE enrollees

4-20 2013 LeadingAge Ziegler 100

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

4-20a NUMBER OF LZ 100 ORGANIZATIONS, 2009-2012



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

| | Total Number of Small Houses | Total Number of Small Houses that are Green Houses® |
|--------------------|------------------------------|---|
| Largest 10 (n=2) | 41 | 0 |
| Largest 25 (n=5) | 44 | 0 |
| Largest 50 (n=11) | 140 | 38 |
| Largest 100 (n=18) | 190 | 40 |

LeadingAge 100 Ziegler

Chapter 5

Growth and Change

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

The charts provide a dramatic picture of the pace of growth over the last century, particularly since 1950. The most rapid growth has occurred since 1990, with independent living leading this growth. The growth in number of assisted living and nursing care beds shown on each of the charts (relatively flat) has been achieved primarily through CCRC construction as opposed to the addition of free-standing communities. The cross-over in growth rates, i.e. when the growth in NCBs and ALUs was eclipsed by the growth in ILUs occurred in the early 1960s. Chart 5-1b shows that ILU growth for the LZ 100 (largest 10 Systems, excluding ELGSS) began its current trend of more rapid ascent in the mid-1970s.

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

The Kendal Corporation (LZ 100 #8) has nearly tripled in size in the last 20 years (Chart 5-4g). From its inception in 1971, it has grown to approximately 3,400 units. Since 2000, it has added more than 1,000 units. Kendal envisions the full impact of its work as “the transformation of our culture’s view of aging, of older persons, and of the potential for fulfillment and continuing contribution during the later stages of life.” This organization has grown through new community development and construction and affiliation with similar organizations, both which have enabled Kendal to continue to respond to the call to broaden its services. Ziegler has termed “constituency alignment” as one of the necessary ingredients for successful growth, no matter what the pace of growth or change. To achieve the pace of growth shown for this organization, it must continually work to find strategic alignment among staff, board, residents and investors. From Ziegler’s experience, organizations that are successfully implementing this type of strategic change have worked to develop a culture willing to embrace the inevitable challenges.

As emphasized above, however, constituency alignment is an ingredient for successful growth and change, no matter what the pace of growth. Chart 5-2a examines the growth rate of the largest 10 in another manner. Here it is clear that the pace of growth of the other eight of the nine tracked in the largest 10 is occurring at widely varied rates for each system and over different periods of time. These organizations are also focused on ensuring that their constituencies, from residents to capital markets participants, are mutually aligned to understand the strategic goals for growth and change in their organizations.

Chart 5-2b compares organizations ranked three (3) through ten (10) of the LZ 100; the growth rates of these organizations can more easily be compared on a scale that doesn’t include National Senior Campuses or Evangelical Lutheran Good Samaritan Society.

Pace of Growth: The Largest 25

Pace of Growth charts (Charts 5-4a-w) trace the growth patterns of 23 of the 25 largest multi-sites in the LZ 100. Each significant point of growth in a multi-site’s history is marked and explained on the chart. We continue to exclude two of the largest 25 organizations of the LZ 100 where we have insufficient detail to track historical growth for Pace of Growth charts: ELGSS (LZ 100 #1) and Ecumen (LZ 100 #18). The Pace of Growth charts show, at a glance, the different methods of change the systems are employing. As before, significant new community construction and expansions are noted, with the emergence of the system (that is, the addition of the second community) highlighted in a dashed box. Mergers and acquisitions (gray-framed box) and dispositions (bold black box) are also highlighted.

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

Single-state system Westminster Communities of Florida (LZ 100 #9, Chart 5-4h) is an organization that has grown predominantly through acquisition. Starting with the acquisition of Westminster Towers approximately 30 years ago, the organization doubled in size in the 1990s and early 2000s, primarily through the expansion of existing communities or through acquisition. Only this system’s market-rate housing is shown on the Pace of Growth chart; it owns and manages a significant number of government-subsidized units as well.

Across-states system Presbyterian Senior Living (LZ 100 #11, Chart 5-4j) has grown dramatically since 2002. Its most recent growth was through expansions at Westminster Woods and The Long Community and the openings of The Long Community at Highland (in 2011) and Carroll Village (in 2009). However, its traditional manner of growth has primarily been through acquisition, particularly through denominational ties. Metropolitan system Willow Valley Retirement Communities (LZ 100 #24, Chart 5-4v) is a relatively slow grower. This organization comprises three large campuses located in close proximity, separated by a retail area.

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

Emerging Systems

What may be obvious, but should nonetheless be stated, is that nearly all of the systems “emerged” from a single-site organization. However, the length of time for emergence varies widely among the LZ 100. Chart 5-5a shows the addition of second communities by the LZ 100 organizations, sorted by the date of founding of the organization. Note that among the ten pre-1900 founded organizations, four have opened their second communities since 2000 (Simpson Senior Services (LZ 100 #92), St. Ann’s Community (LZ 100 #91), Lutheran Life Communities (LZ 100 #54) and Concordia Lutheran Ministries (LZ 100 #30); three of the four have opened a third campus, as well. Changing leadership, both at key executive levels and in board positions, as well as unique opportunities in the marketplace often move organizations with rich histories as single sites to consider growth.

Chart 5-5b organizes the emergence of systems by the decade in which the second community was added. It was in the 1960s and 1970s that many of the LZ 100 organizations began to add second communities. New not-for-profit systems are emerging every year. Many of these systems are emerging out of metropolitan areas that are facing more competitive pressure, or out of more sophisticated, larger, single-site organizations whose management teams and boards are ready to expand the mission and the desire to serve more residents. Among the nearly 500 organizations tracked for preparation of this publication are a number of organizations that have just emerged as systems, recently having added their second campus with a goal to grow further. For instance, Friendship Village of Schaumburg (affiliate of Friendship Senior Options) was #16 on the 2012 listing of single-campus senior living communities and joined the ranks of the LZ 100 in 2013 with the addition of its newest campus, Greenfields of Geneva, which opened in early 2012 in Geneva, Illinois. Chart 5-5c is a scatter graph illustration of the emergence data in a more visual form. The scatter graph illustrates that the oldest LZ 100 organizations took from 80 to 100 years to add their second communities. The organization that took the longest to “emerge” into a system was LZ 100 # 92 Philadelphia-based Simpson Senior Services. The scatter graph also illustrates that “younger” LZ 100 organizations tend to add their second communities more quickly. Senior Quality Lifestyles, founded in 1999, built its first campus in 2001, opened its second in 2005 and its third in 2007. The diagonal line across the scatter graph is a reference point for understanding how close to the current year a new campus has been added; the closer an organization is to this line, the more recent its emergence. Charts 5-5d and 5-5e offer additional perspectives on system emergence. While more than half of the LZ 100 took more than 15 years to add a second site, the addition of a third site typically occurs much more rapidly.

Rapid Growers

The “rapid growers” are the organizations within the LZ 100 that have increased in size the fastest between 2011 and 2012, between 2000 and 2012 and between 1990 and 2012 (Charts 5-6a-b). They are the leading multi-site organizations in the LZ 100 in terms of aggregate growth rates and total units added in each period.

Fastest Aggregate Growth: 1990 to date and 2000 to date

National Senior Campuses (LZ 100 # 2)

National Senior Campuses (NSC) opened its first community, Oak Crest Village, in Parkville, Maryland in 1995.

Currently NSC operates fifteen CCRCs (after selling two in 2010) located throughout the country.

Fastest Aggregate Growth in 2012

Givens Estates (LZ 100 # 97)

Givens Estates acquired Highland Farms, a CCRC with 214 ILUs, 30 ALUs and 60 NCBs, in December of 2012. This system now comprises Givens Estates, a CCRC with 385 ILUs, 61 ALUs and 71 NCBs, and Givens Highland Farms. The Highland Farms acquisition enhances the organization’s ability to expand in the middle-income market in the Asheville, North Carolina, area.

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

In initial publications of the LZ 100, average annual growth rate was presented as a straightforward arithmetic calculation that tended to mask the actual growth trends of systems. Average annual growth is calculated through a geometric mean calculation that captures the time factor in growth. For example, it may have taken an organization 50 years to double from the size of its original single-site campus; it may have then doubled again in a five-year period. These changes in growth rates are not uncommon and may be the result of a combination of a new management team with a new focus or an existing team’s shift in focus and a decision to accelerate.

When ranked by units added, there is wide variation in LZ 100 size among rapid growers during 2012. The largest system among rapid growers in 2012 is Presbyterian Homes and Services (LZ 100 #4) while the smallest system among rapid growers in 2012 is Givens Estates (LZ 100 #97) . Chart 5-6c offers a focused picture of the range in the pace of growth among the largest of the LZ 100. In 2012, the fastest growers among these large organizations range from an annual growth rate of 5.62 percent by Presbyterian Homes and Services (LZ 100 #4) to an average annual growth rate of 8.21 percent by The Kendal Corporation (LZ 100 #8).

We continue to track both single-campus organizations that have recently moved to two-campus, or multi-site, status as well as single-campus organizations poised for growth. Both types of organizations continue on the LZ 100 “watch list” so that we can examine emerging trends from these newly incubating systems.

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

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

Charts 5-8a-c and 5-9a-h describe how the largest 10, the largest 25, the largest 50 multi-sites and all 100 multi-site organizations have grown through expanding existing campuses, through construction of new communities or through merger/acquisition/affiliation and/or disposition. Properties have been classified according to the following definitions:

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

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

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

Disposition: The sale or closure of a community.

The charts at 5-8a-c analyze how communities have changed through the above-described venues over a 10-, 20- and greater than 30-year time period (1980-2012). More than 1,050 communities have been added as a result of campus expansion since 1980 (Chart 5-8a). Dispositions have also increased dramatically. What appears interesting is that of the 150 community dispositions that occurred from 1980-2012 among the LZ 100, more than 130 of these dispositions occurred in the last decade or so (Chart 5-8c).

Charts 5-9a-h are used to present incremental growth by five-year period and cumulative growth by five-year period for each of the LZ 100 groupings (the largest 10, the largest 25, the largest 50, the largest 100) The second of each pair of charts shows the incremental change of the multi-sites, that is, on an annual basis how many existing properties have experienced expansion; how many properties have been added through new community construction or through merger, acquisition, and/or affiliation; and how many properties have been lost through disposition. For the incremental growth charts, the final five-year period is provided with the current year shown alone. The cumulative growth charts provide the number of properties added or lost through each of these methods through the time period shown. For the cumulative charts, the final column shows the cumulative total of all LZ 100 activity through 1/1/13.

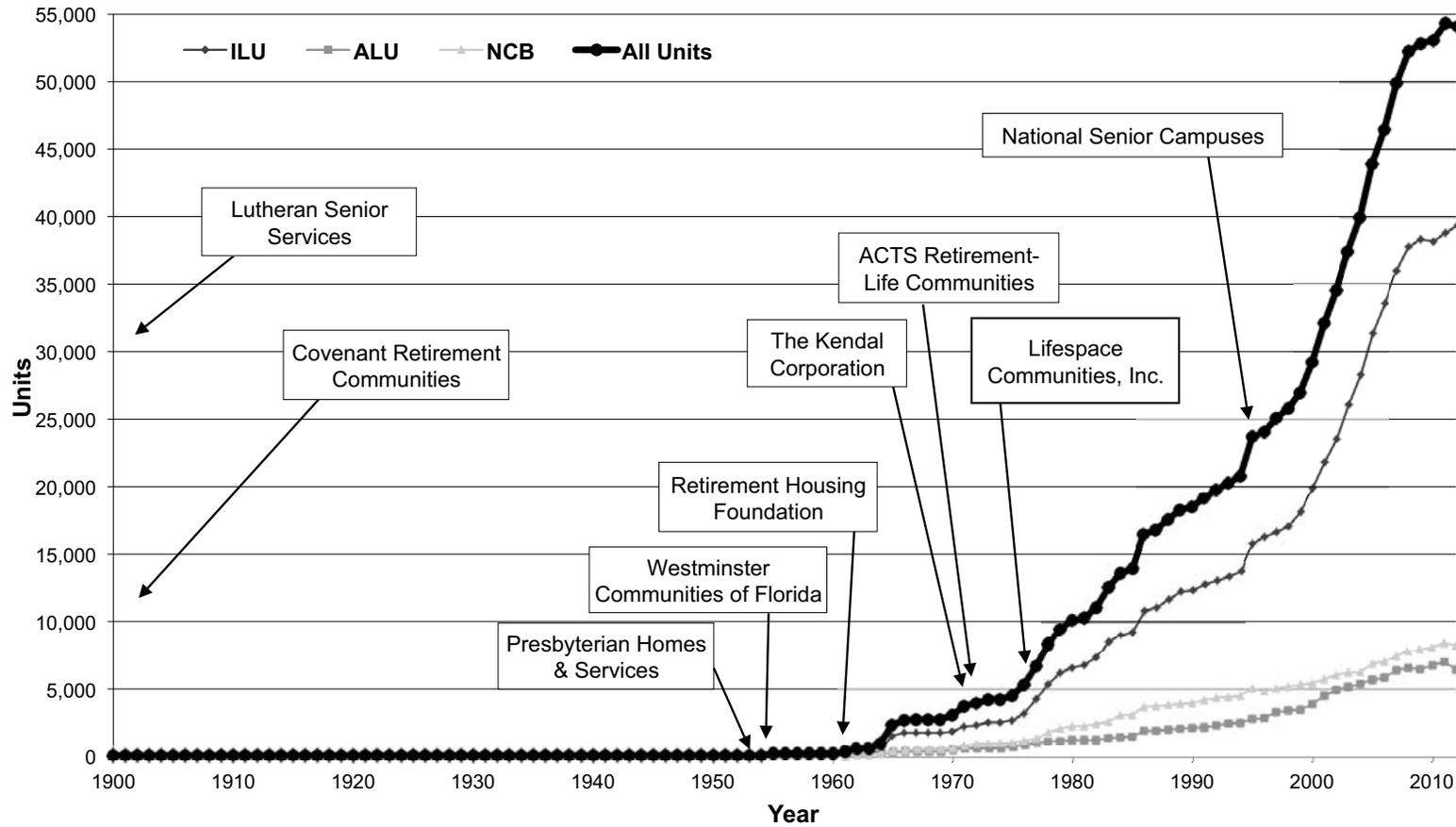
The incremental charts for each of the LZ 100 groupings (the largest 10, the largest 25, the largest 50, the largest 100) show that in the past five years growth continued, particularly in expansions. In 2012, the largest 10 expanded on 25 of their campuses, adding three communities through new construction and one community through merger, acquisition, and/or affiliation (Chart 5-9b). Multi-site organizations appear to be maximizing the utilization of their existing real estate, renovating and expanding on existing property whenever possible. The period of 1/1/05 through 1/1/09 shows unprecedented growth for the prior five-year period when compared with the previous five-year periods since 1980; however, the 2010-2012 timeframe shows an uptick in expansions (Chart 5-10). Organizations are balancing their growth with a continued focus on renovating and replacing of older units.

As noted above, dispositions have increased dramatically in the last seven years. In the period from 1995 to 1999, just ten dispositions had occurred for the entire LZ 100. In the five-year period from 2005 to 2009, 62 dispositions occurred; in 2012, there were 14 dispositions (Chart 5-9h). These dispositions are predominantly nursing home closures or sales. Occasionally the sale of a not-for-profit nursing home may go to another not-for-profit, but generally the winning bidders are for-profit senior living providers. This type of activity may also increase in the current economic climate. Finally, as noted earlier, not-for-profit organizations frequently look to like-minded organizations with which to affiliate or merge. In today's economic climate, an increasing number of single-site not-for-profits may look to not-for-profit multi-sites to forge relationships that will enhance their mission and purpose. Charts 5-10 through 5-13 examine the individual types of growth with listings of the specific properties under construction, acquired through merger and/or affiliation, or identified as dispositions. Maps show the respective locations of these communities.

5-1 2013 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

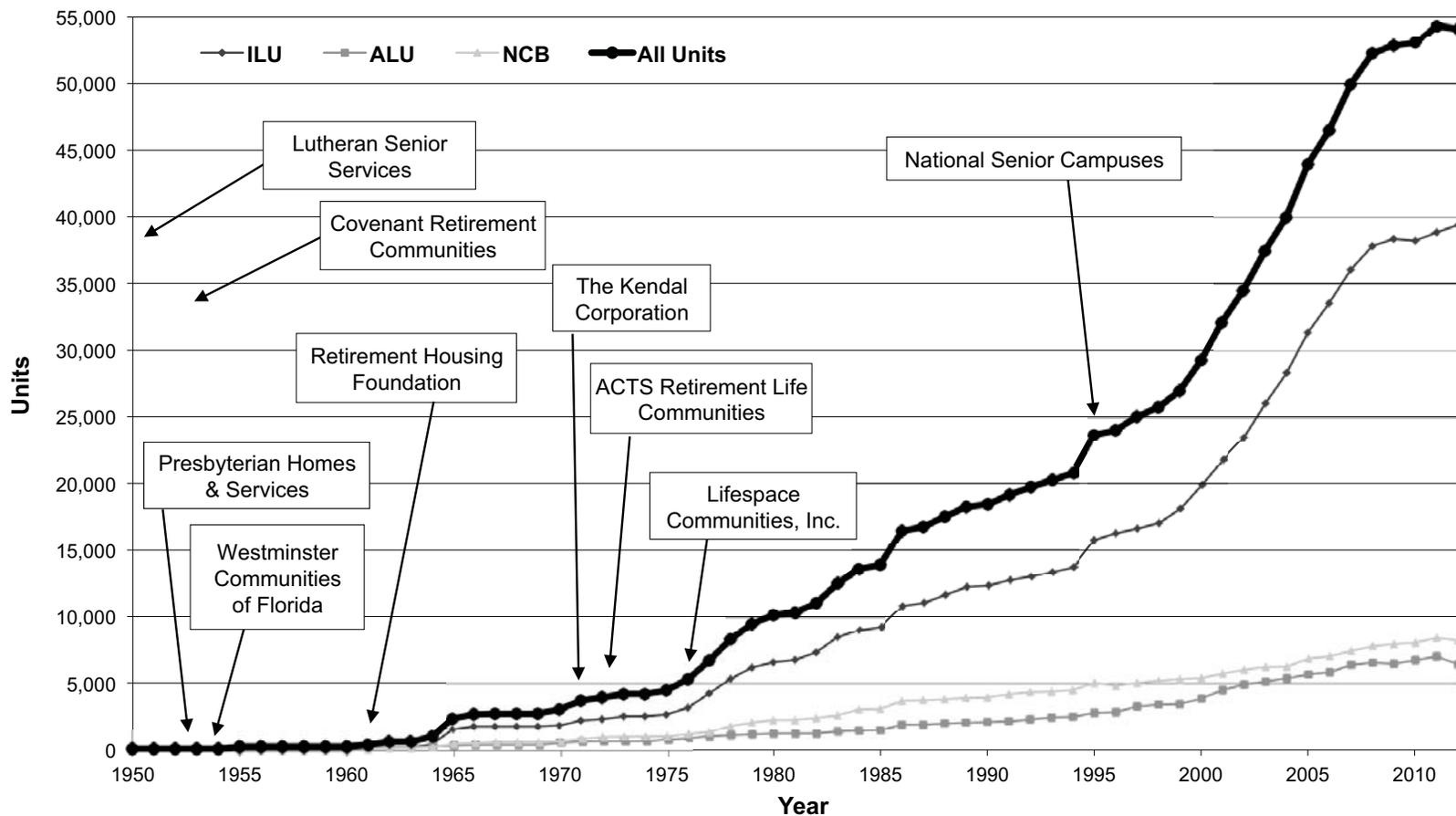
5-1a FROM 1900 (Excludes Evangelical Lutheran Good Samaritan Society)



5-1 2013 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

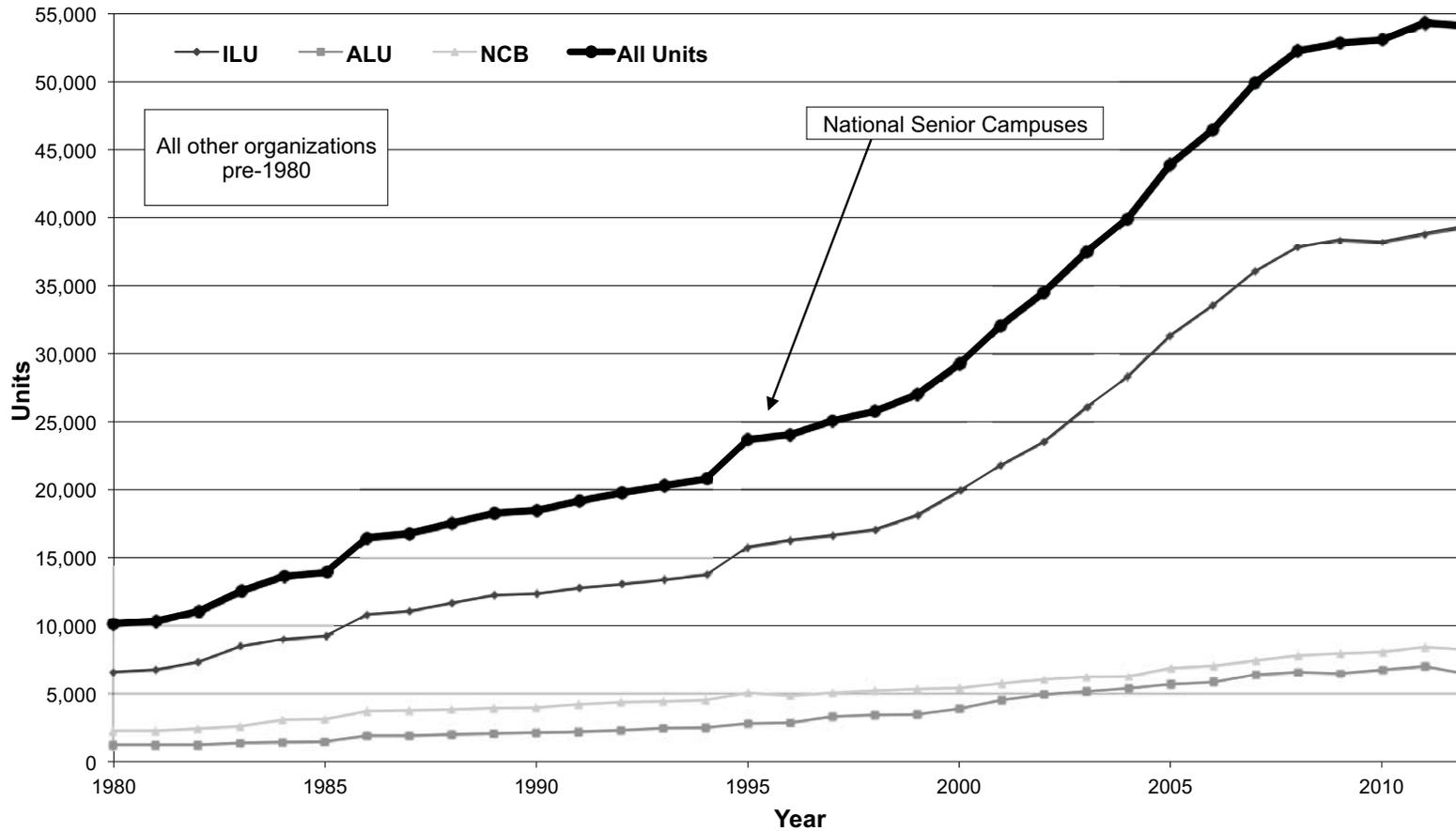
5-1b FROM 1950 (Excludes Evangelical Lutheran Good Samaritan Society)



5-1 2013 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

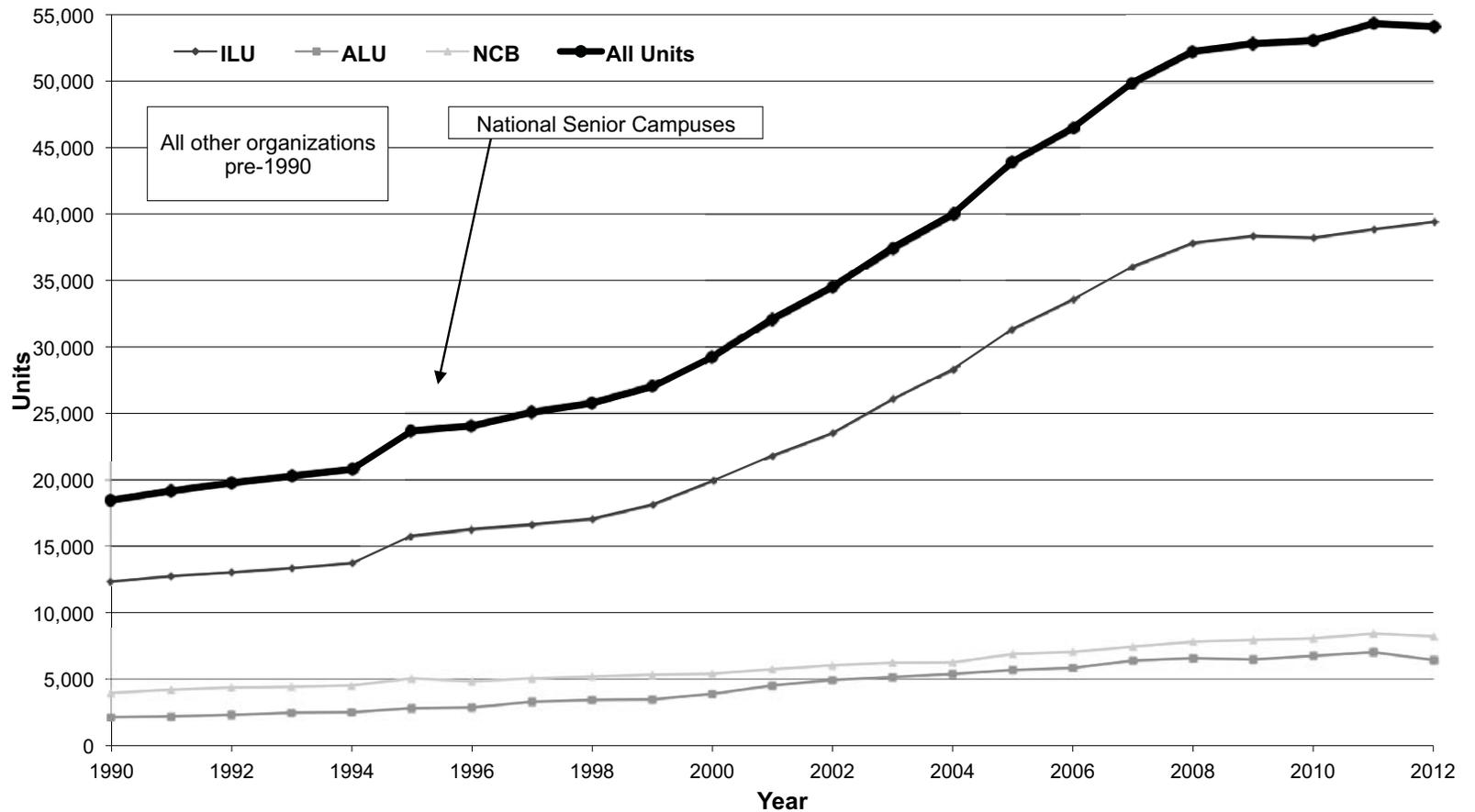
5-1c FROM 1980 (Excludes Evangelical Lutheran Good Samaritan Society)



5-1 2013 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

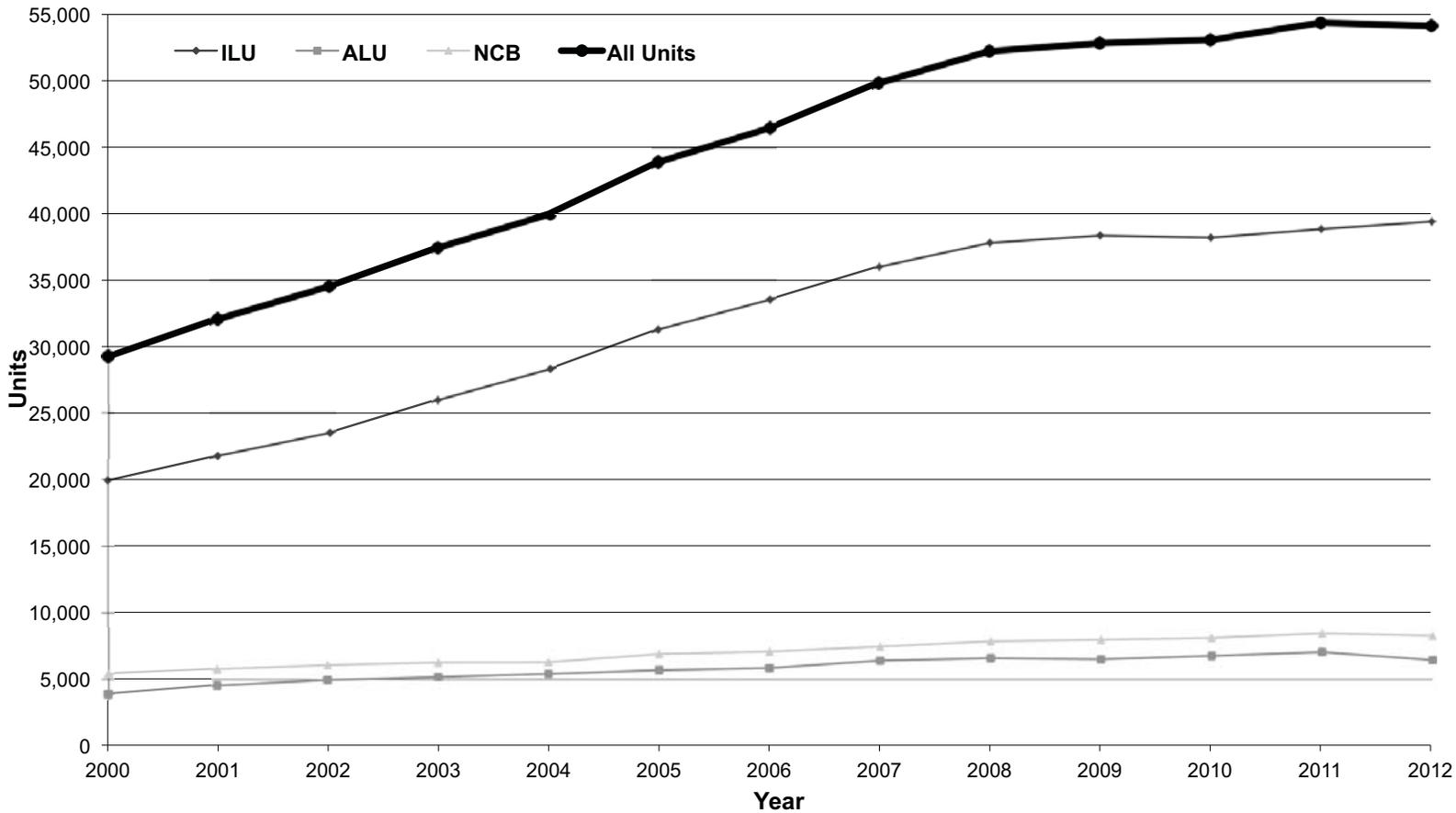
5-1d FROM 1990 (Excludes Evangelical Lutheran Good Samaritan Society)



5-1 2013 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

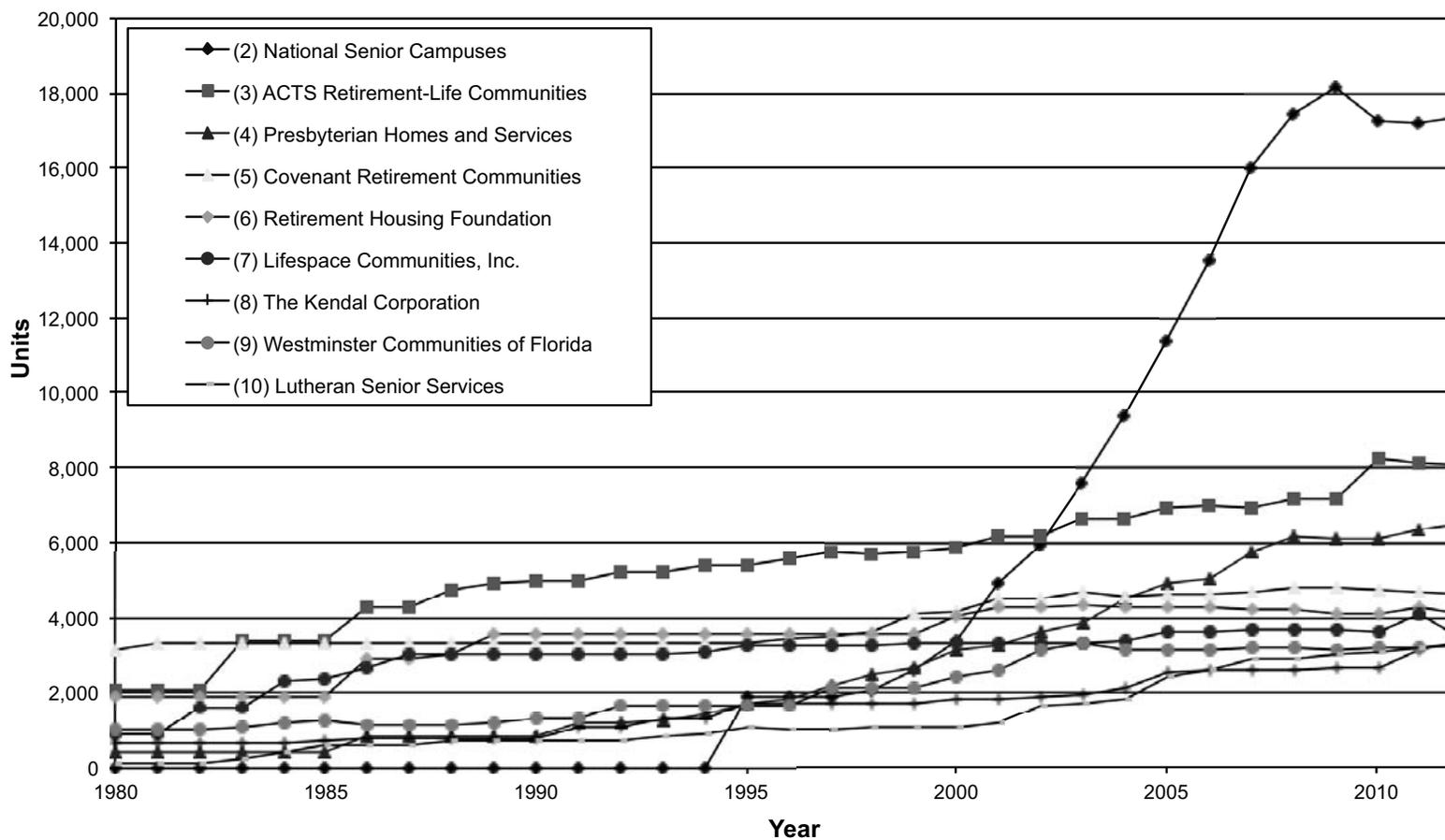
5-1e FROM 2000 (Excludes Evangelical Lutheran Good Samaritan Society)



5-2 2013 LeadingAge Ziegler 100

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

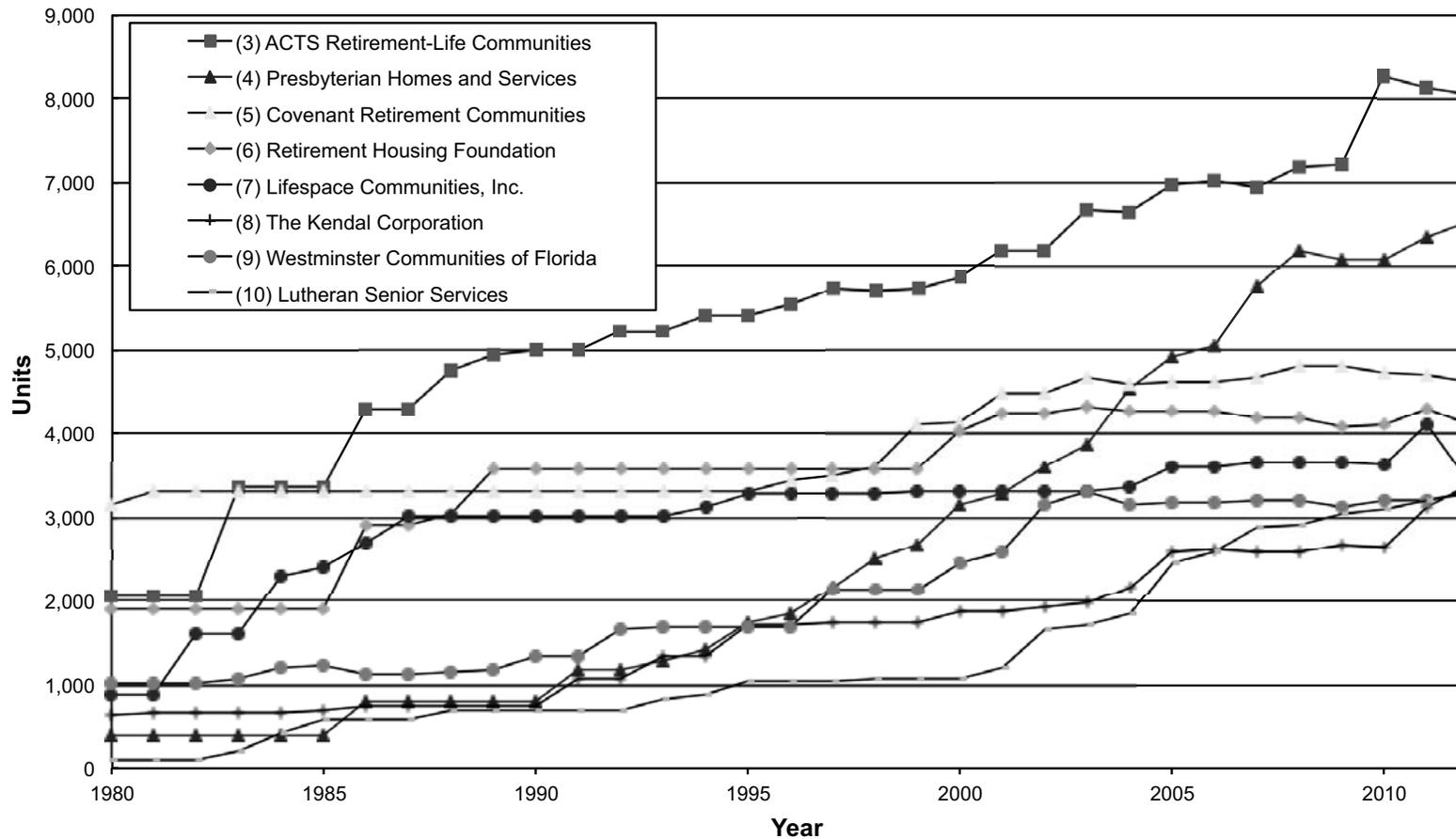
5-2a FROM 1980 (Excludes Evangelical Lutheran Good Samaritan Society)



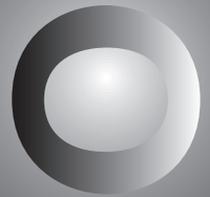
5-2 2013 LeadingAge Ziegler 100

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

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



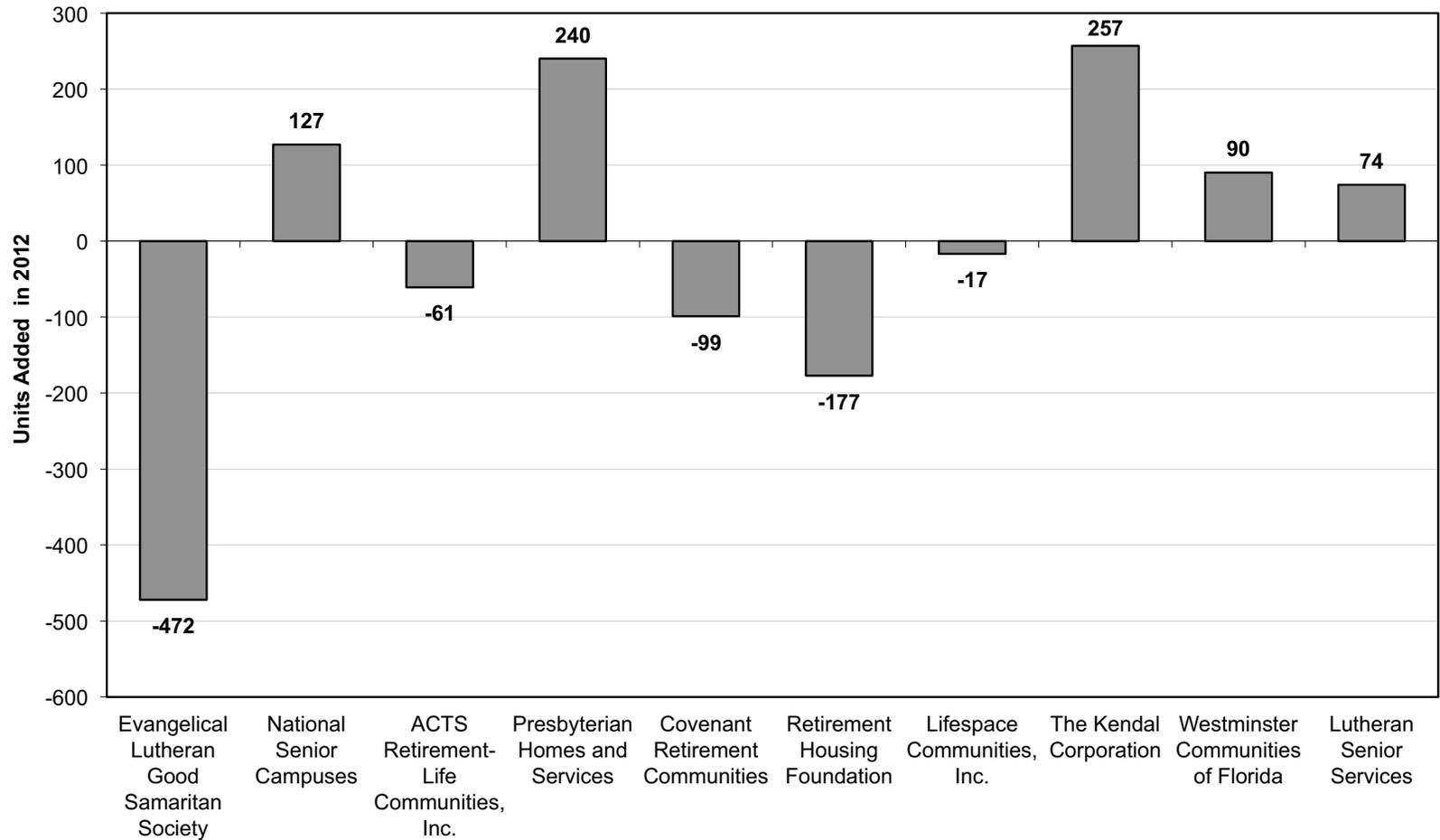
LeadingAge



Ziegler

5-3 2013 LeadingAge Ziegler 100

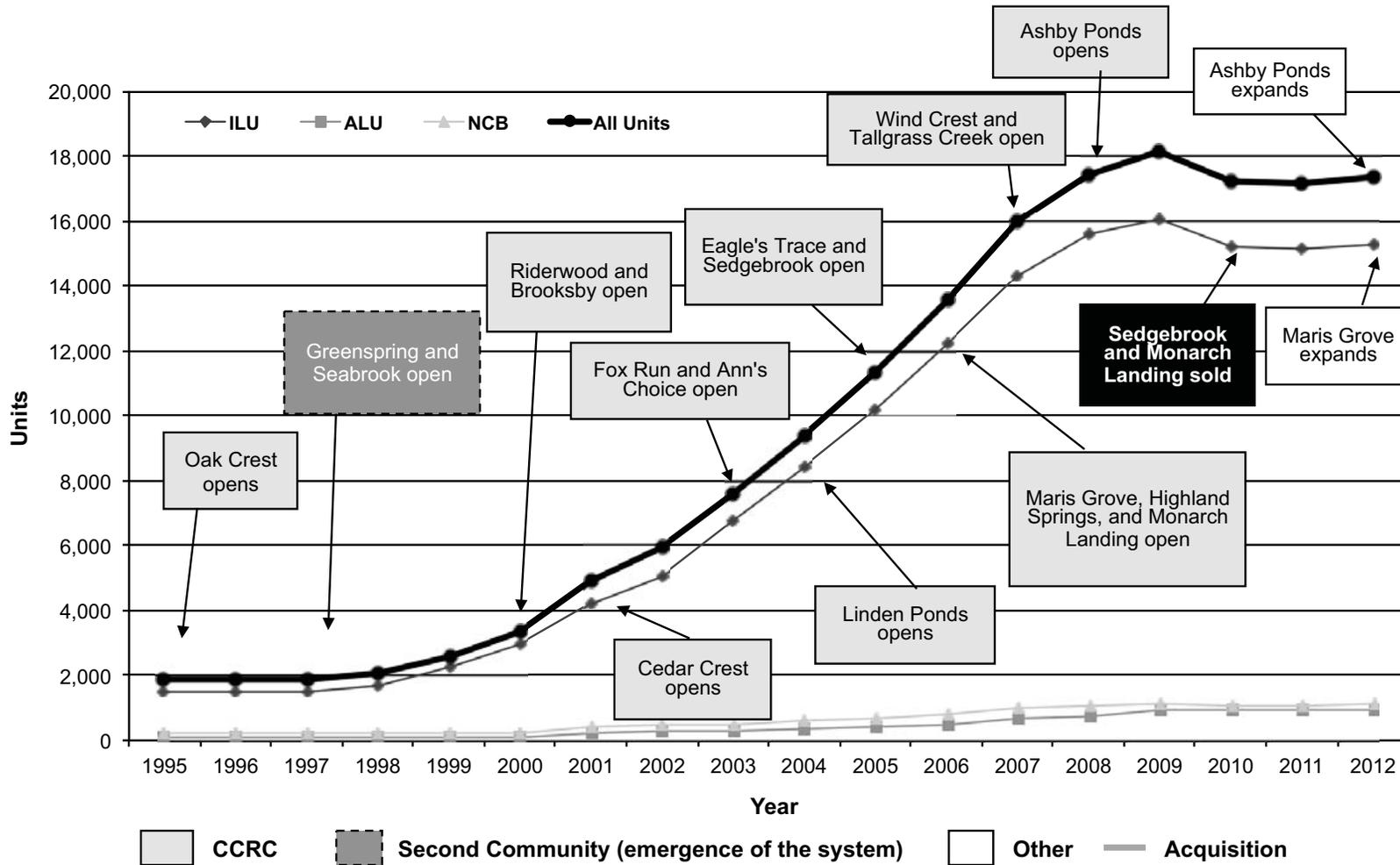
Growth: Rate of Growth for Largest 10 Systems



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

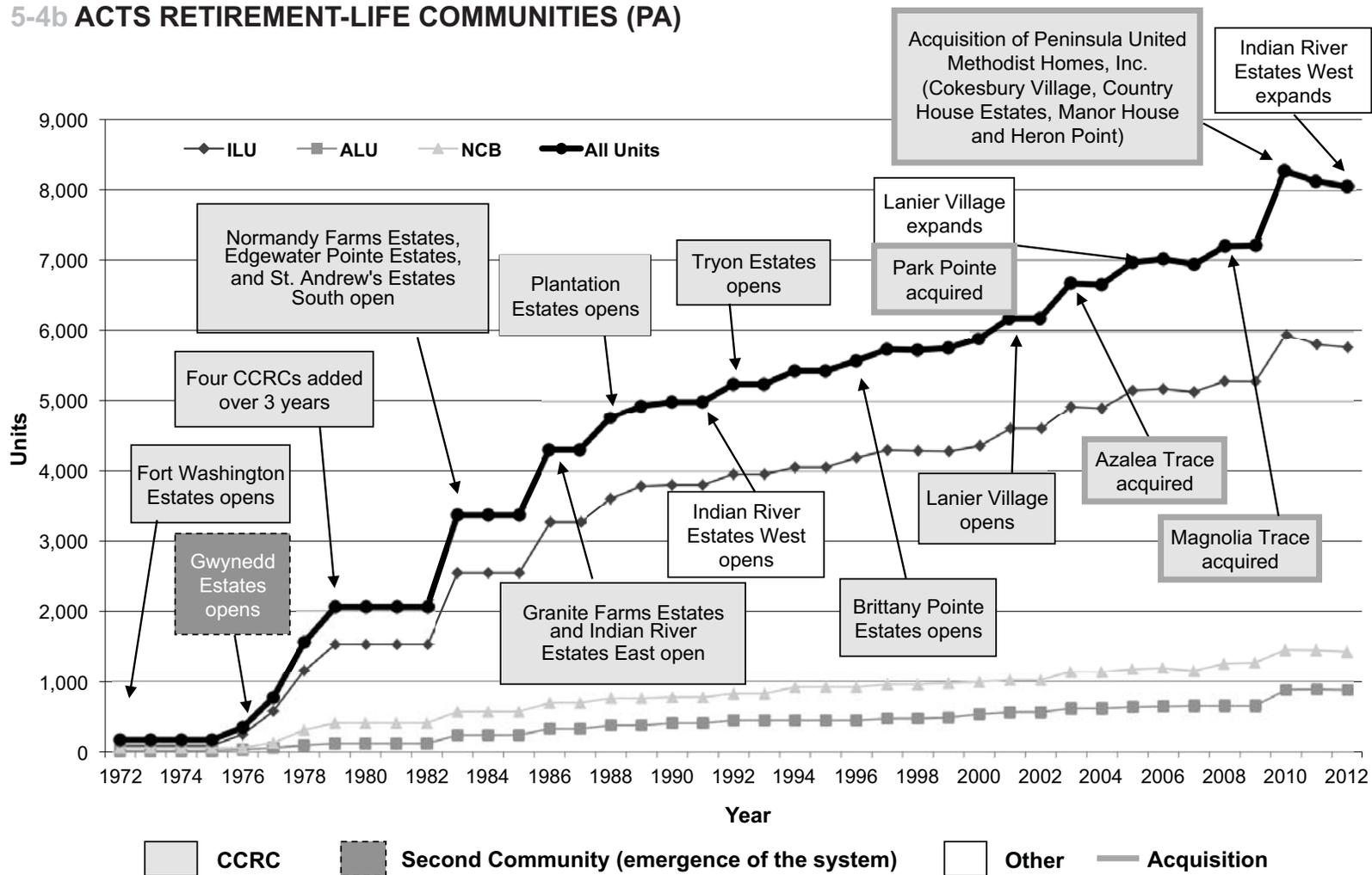
5-4a NATIONAL SENIOR CAMPUSES (MD)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

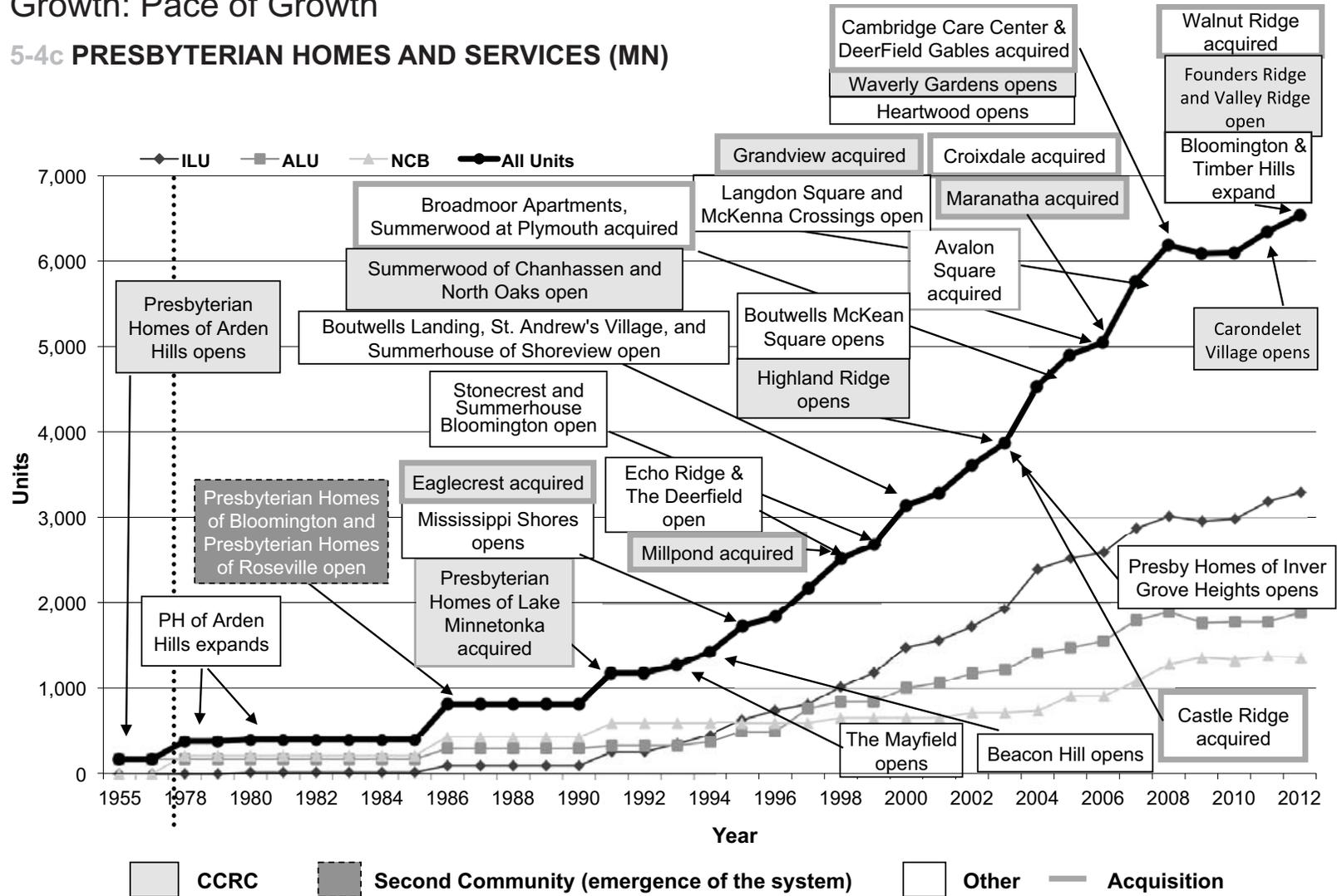
5-4b ACTS RETIREMENT-LIFE COMMUNITIES (PA)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

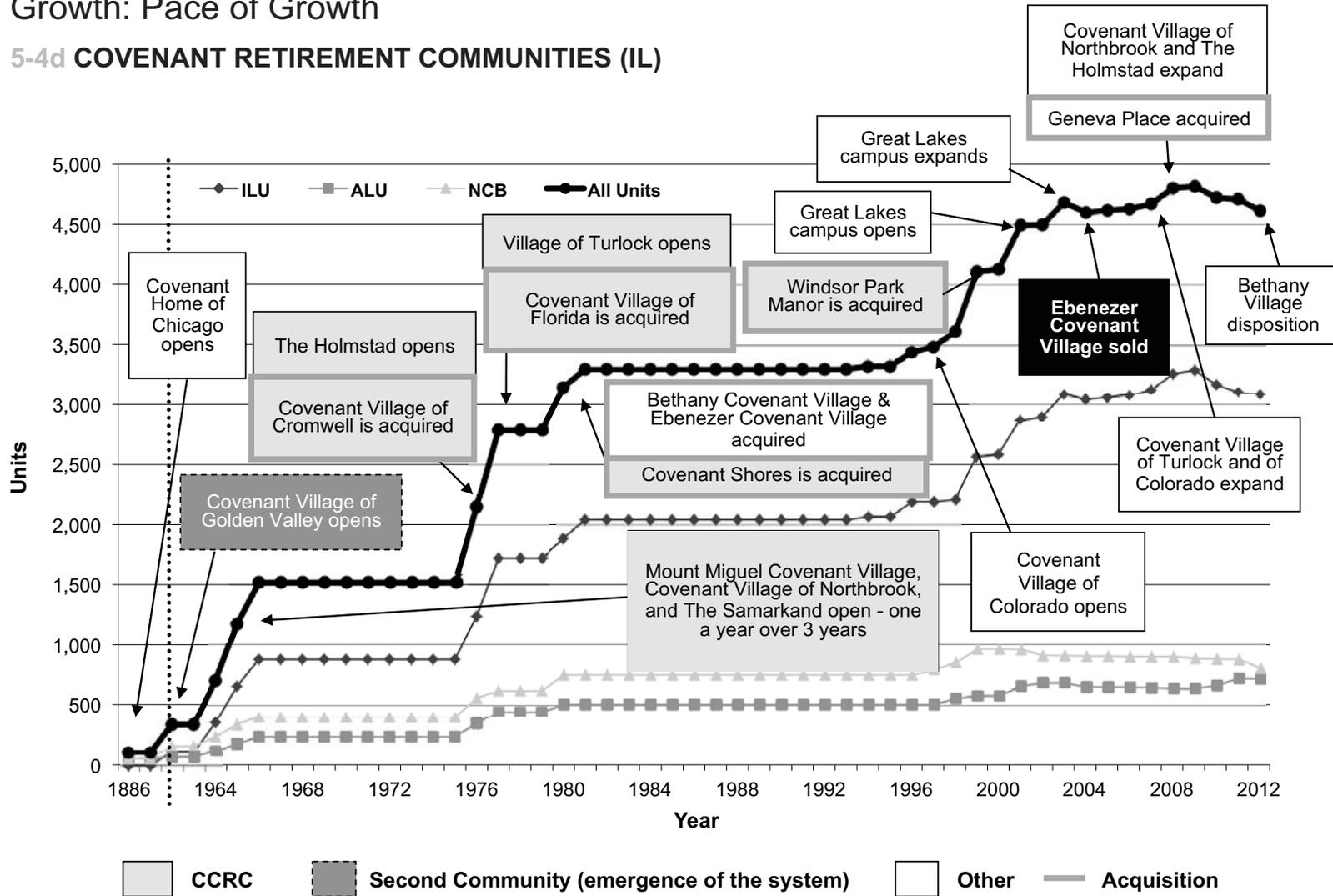
5-4c PRESBYTERIAN HOMES AND SERVICES (MN)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

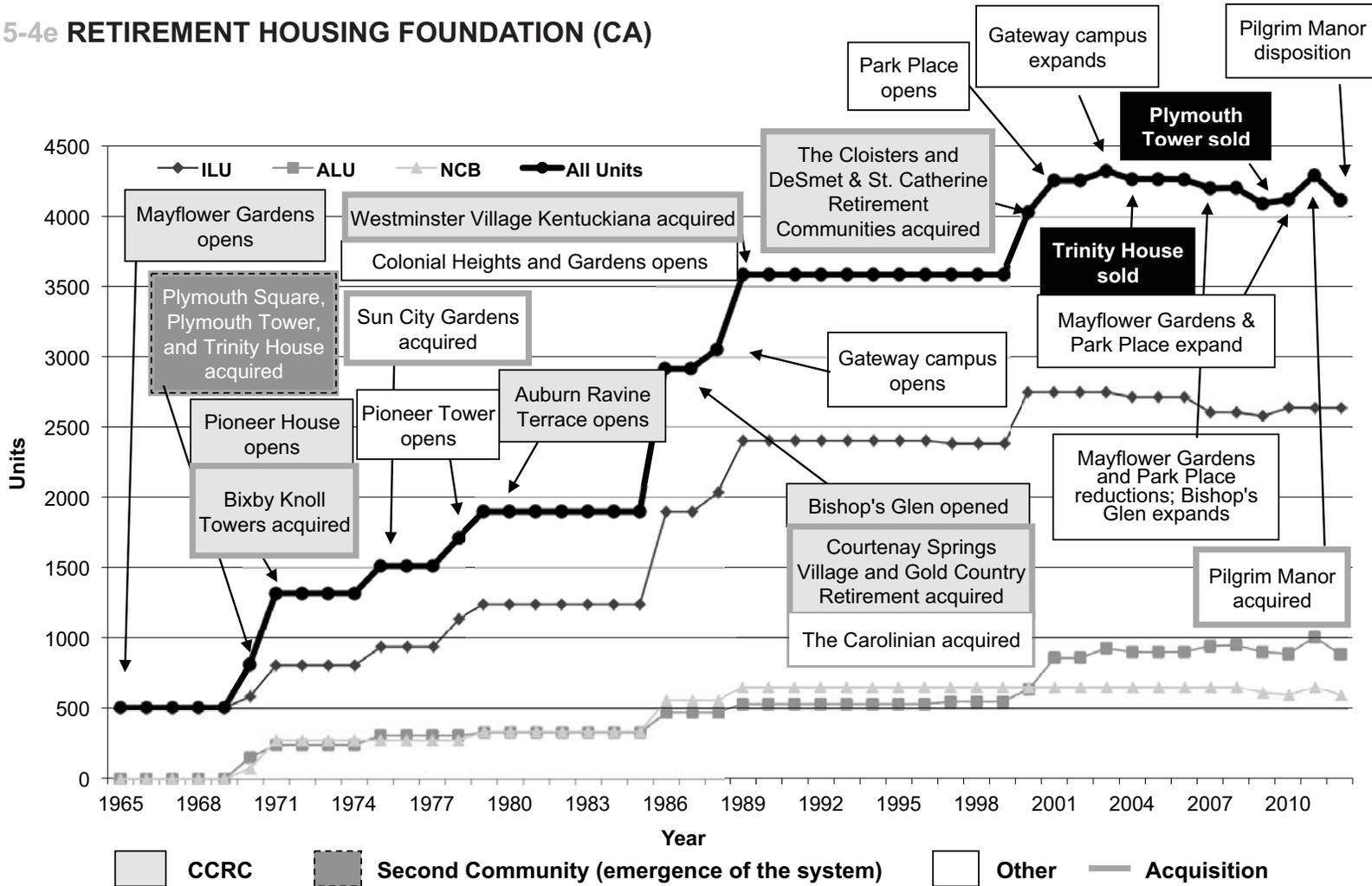
5-4d COVENANT RETIREMENT COMMUNITIES (IL)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

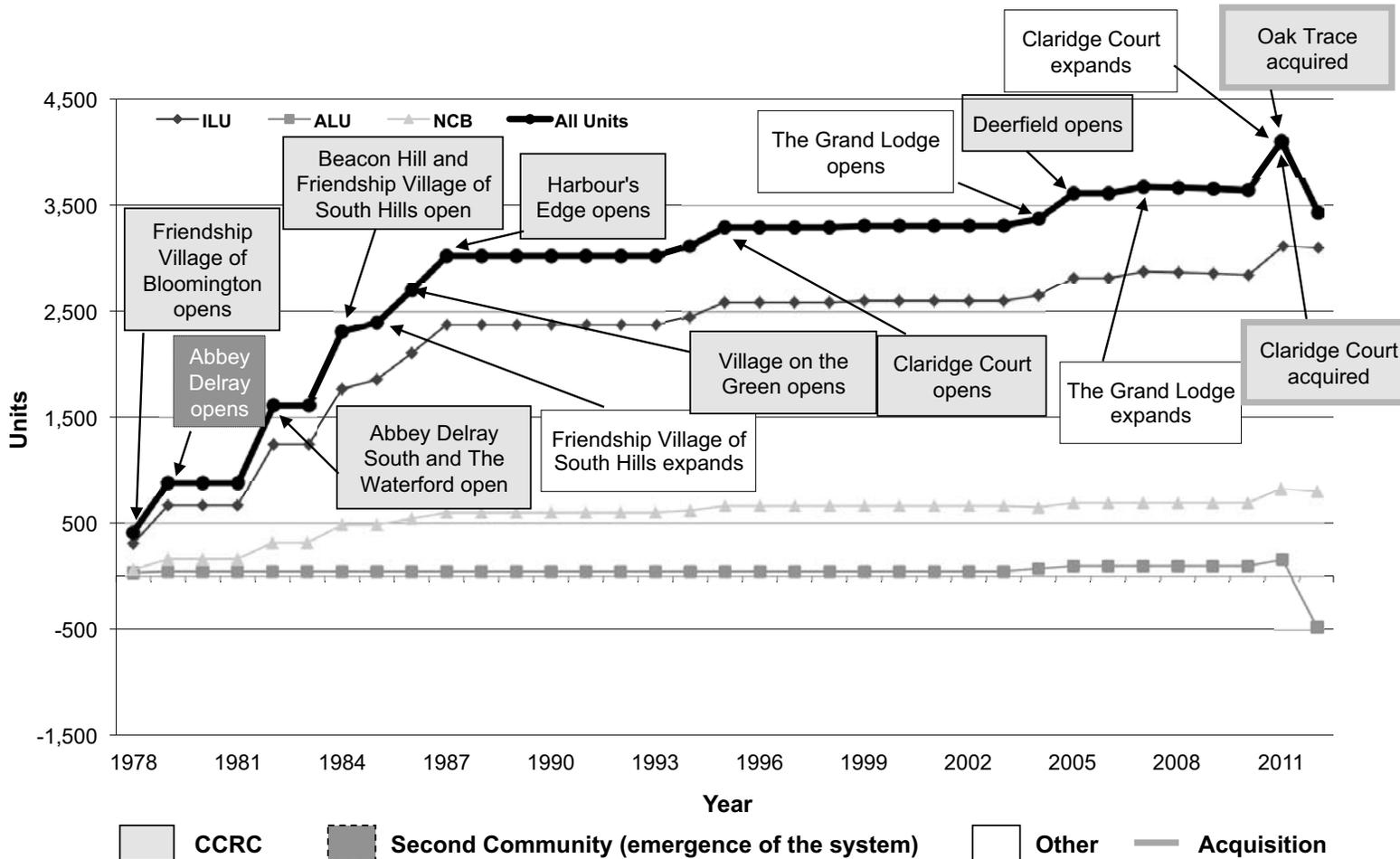
5-4e RETIREMENT HOUSING FOUNDATION (CA)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

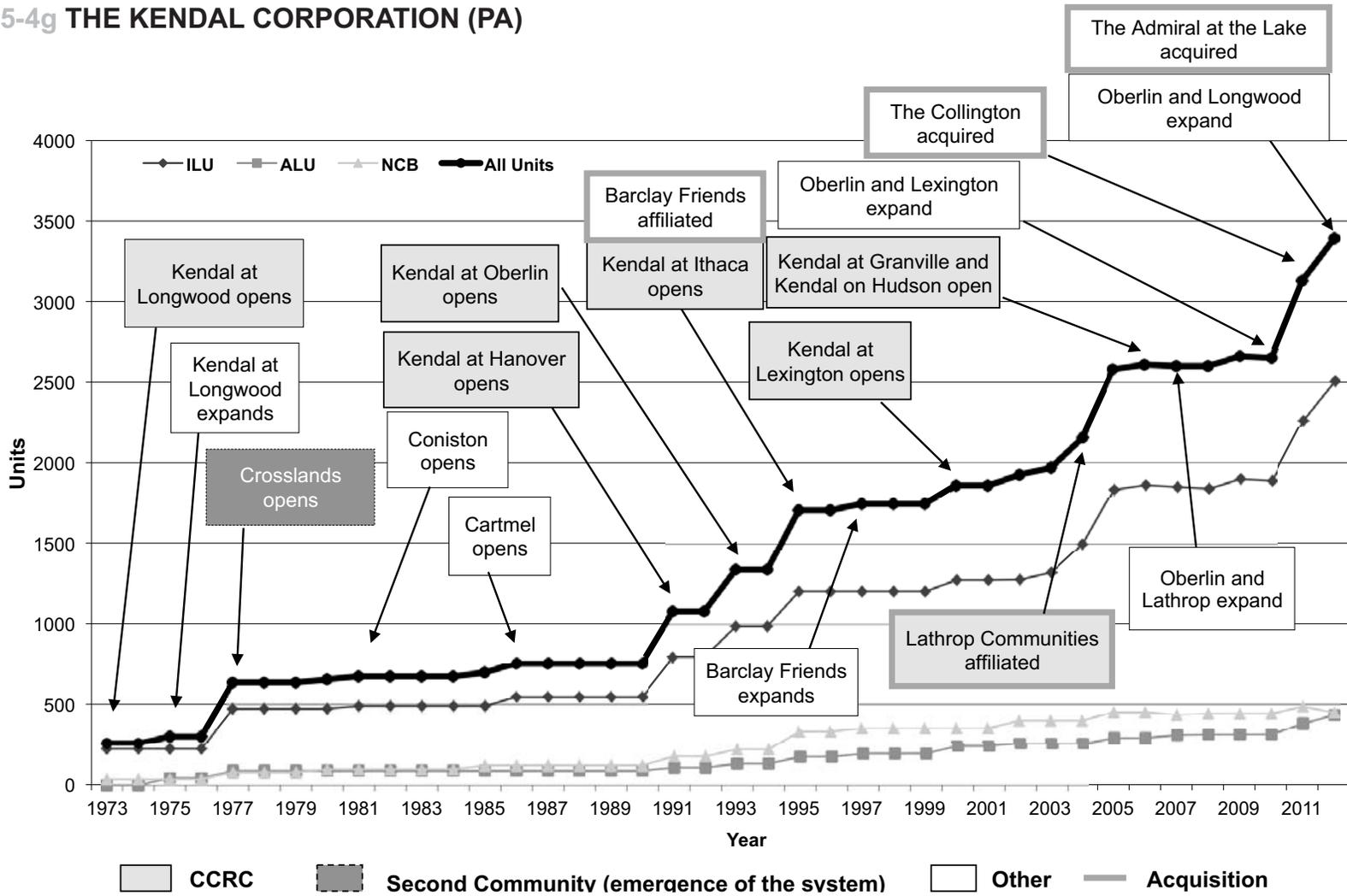
5-4f LIFESPACE COMMUNITIES, INC. (IA)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

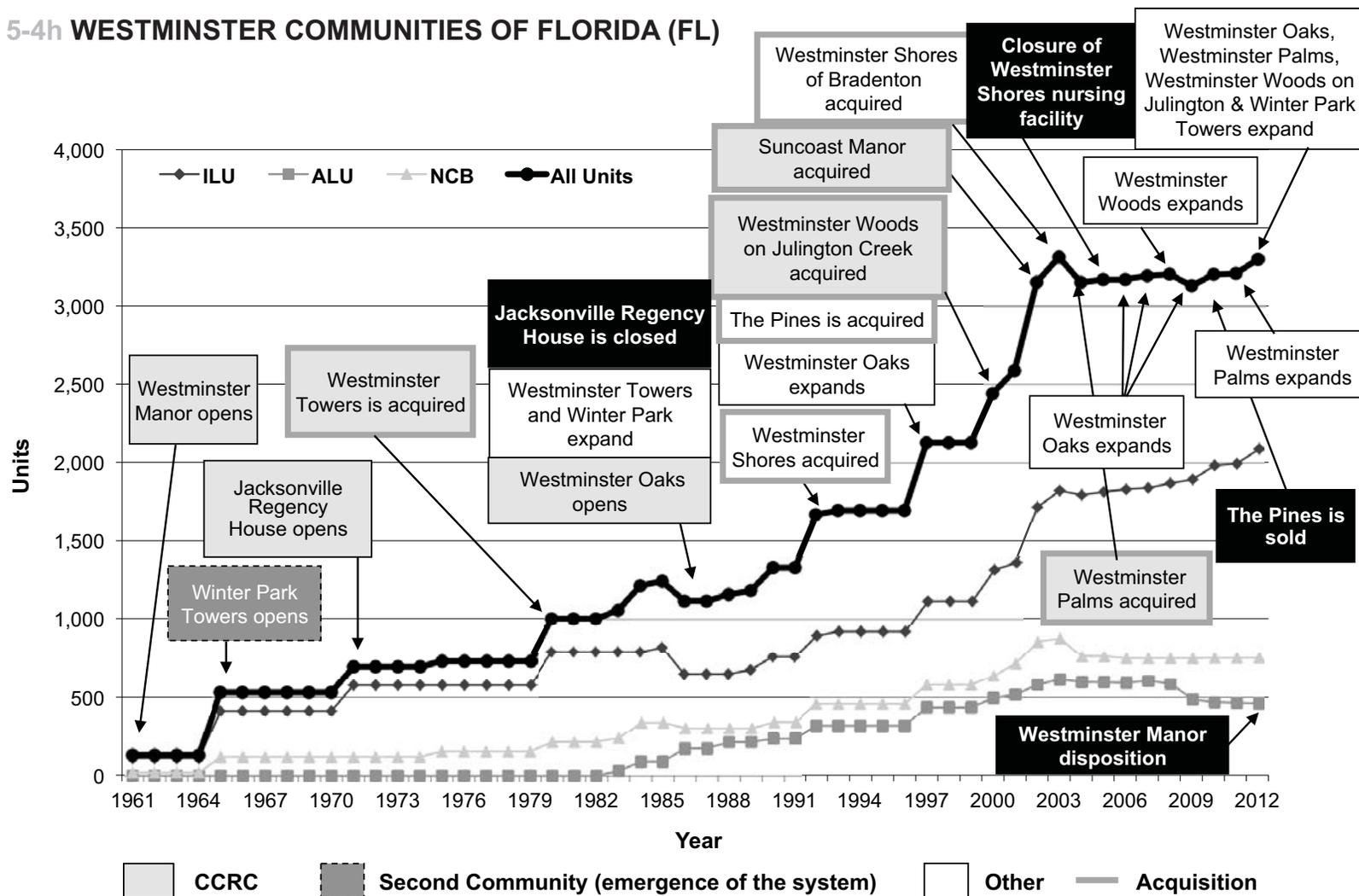
5-4g THE KENDAL CORPORATION (PA)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

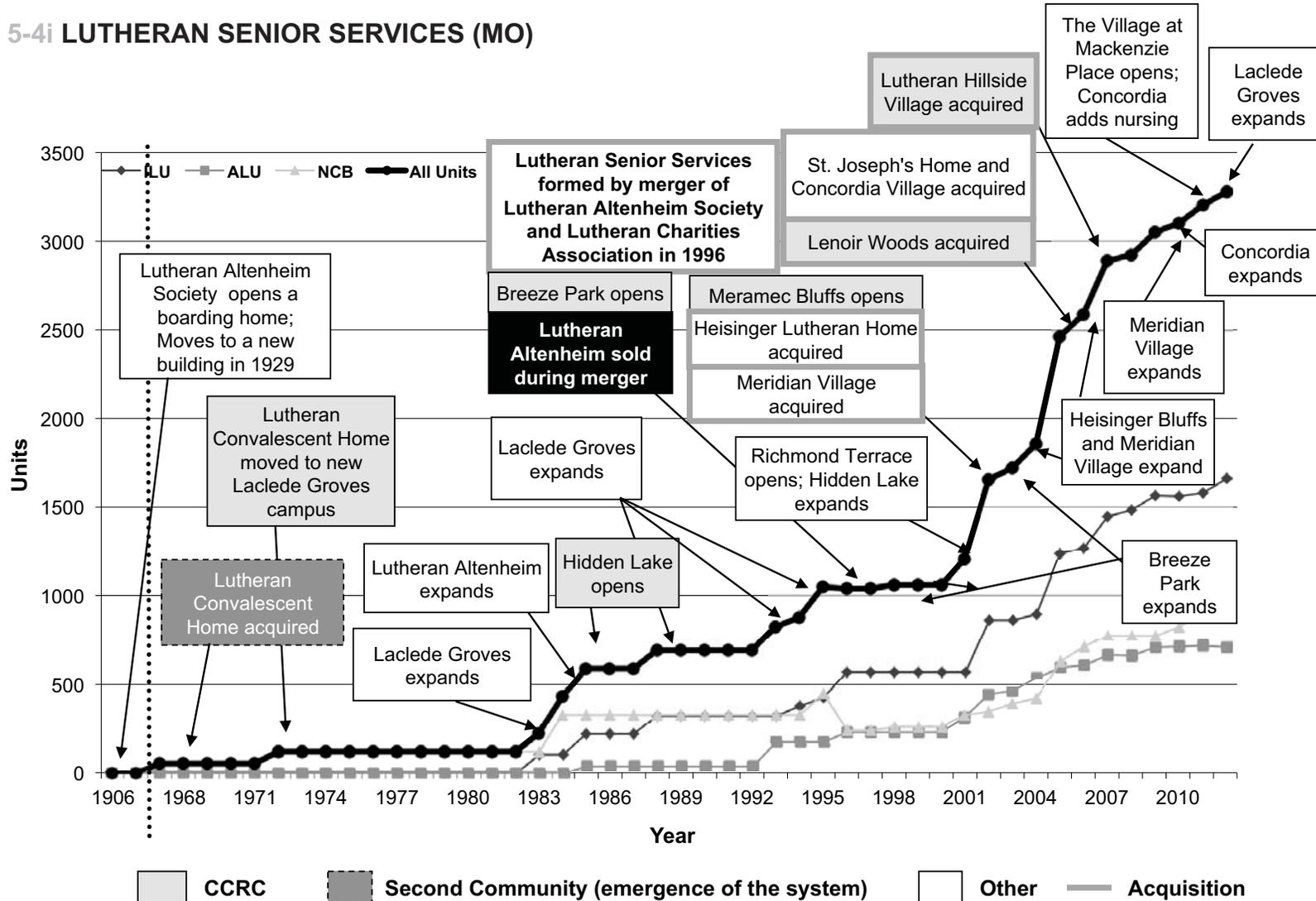
5-4h WESTMINSTER COMMUNITIES OF FLORIDA (FL)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

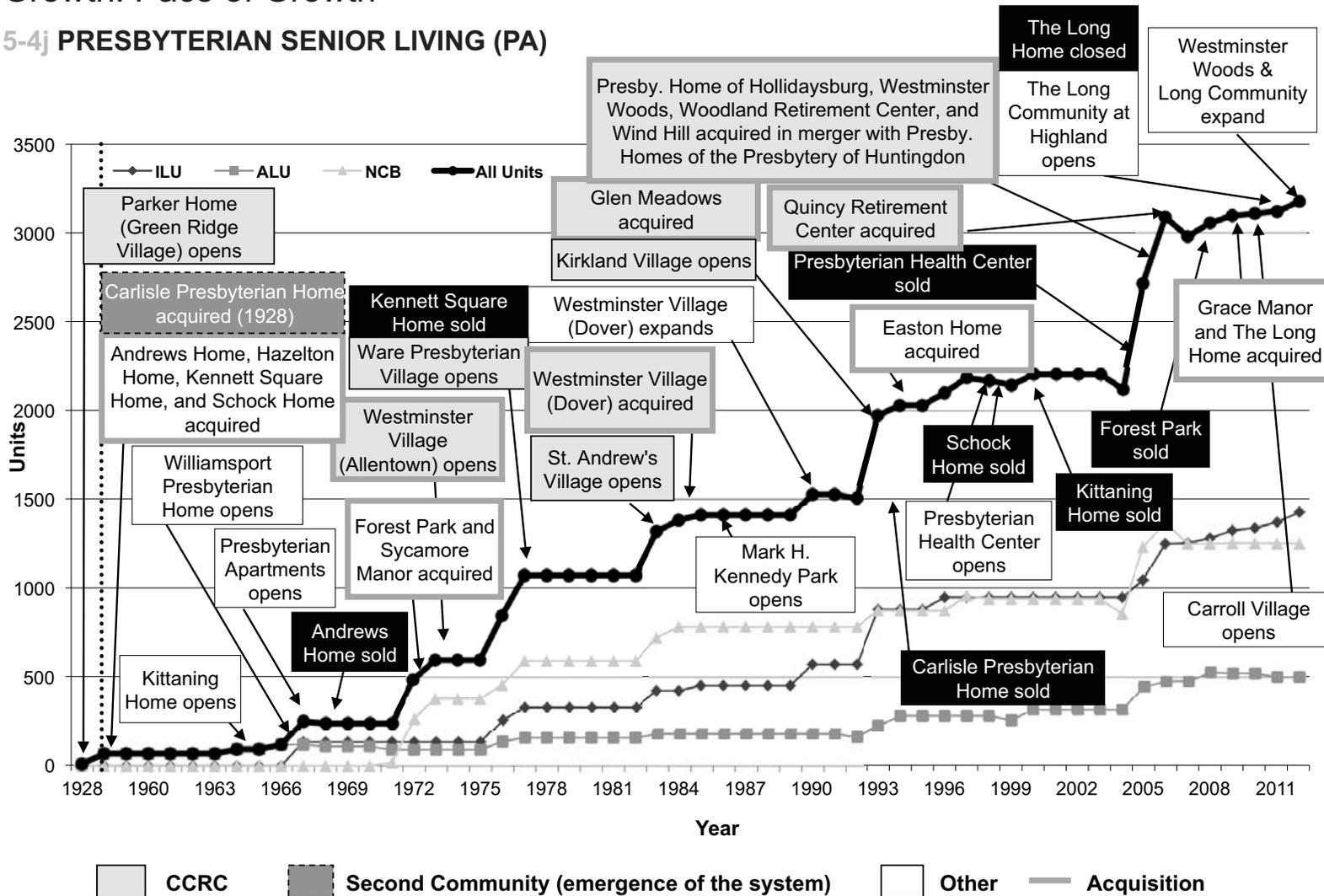
5-4i LUTHERAN SENIOR SERVICES (MO)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

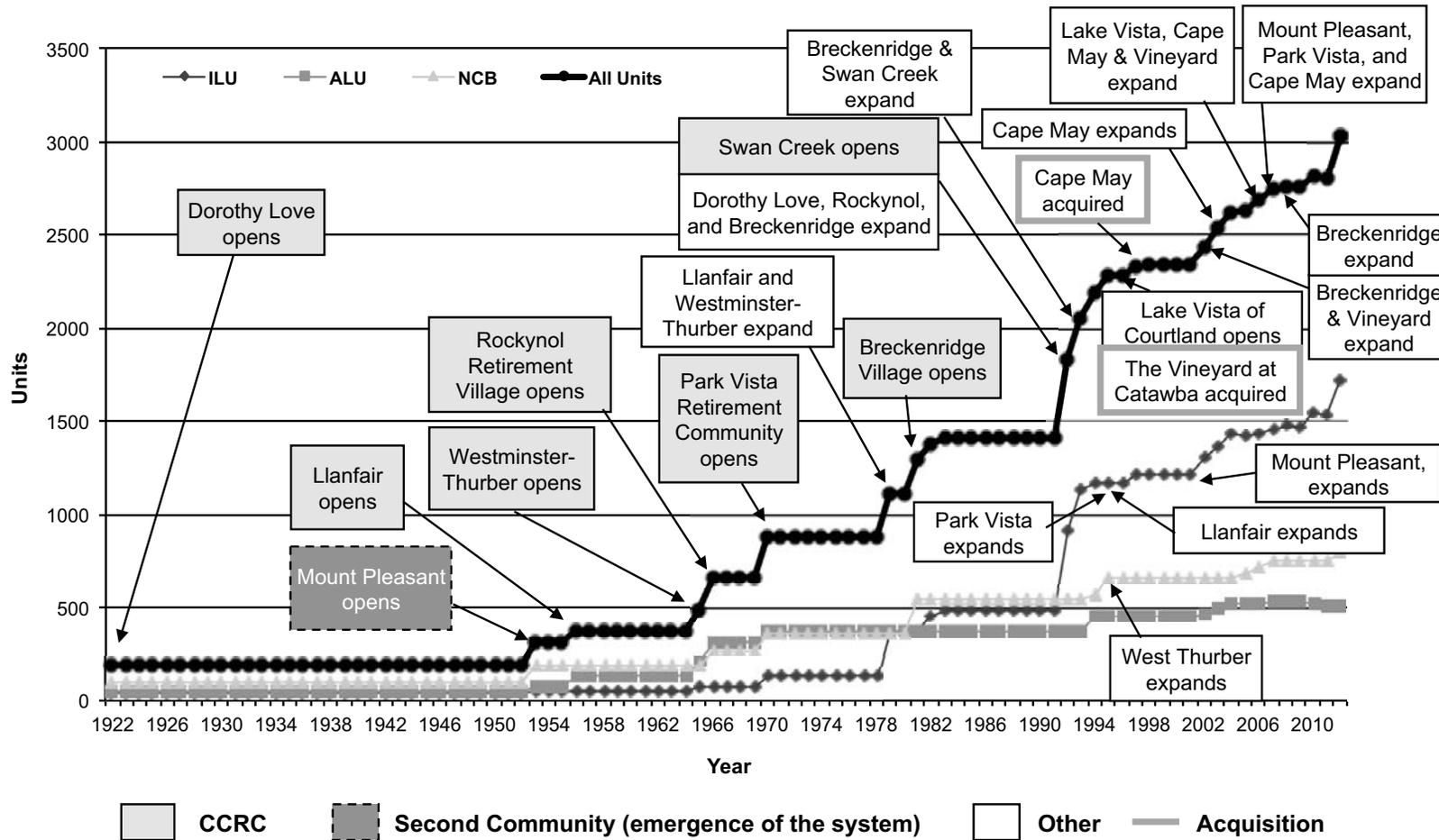
5-4j PRESBYTERIAN SENIOR LIVING (PA)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

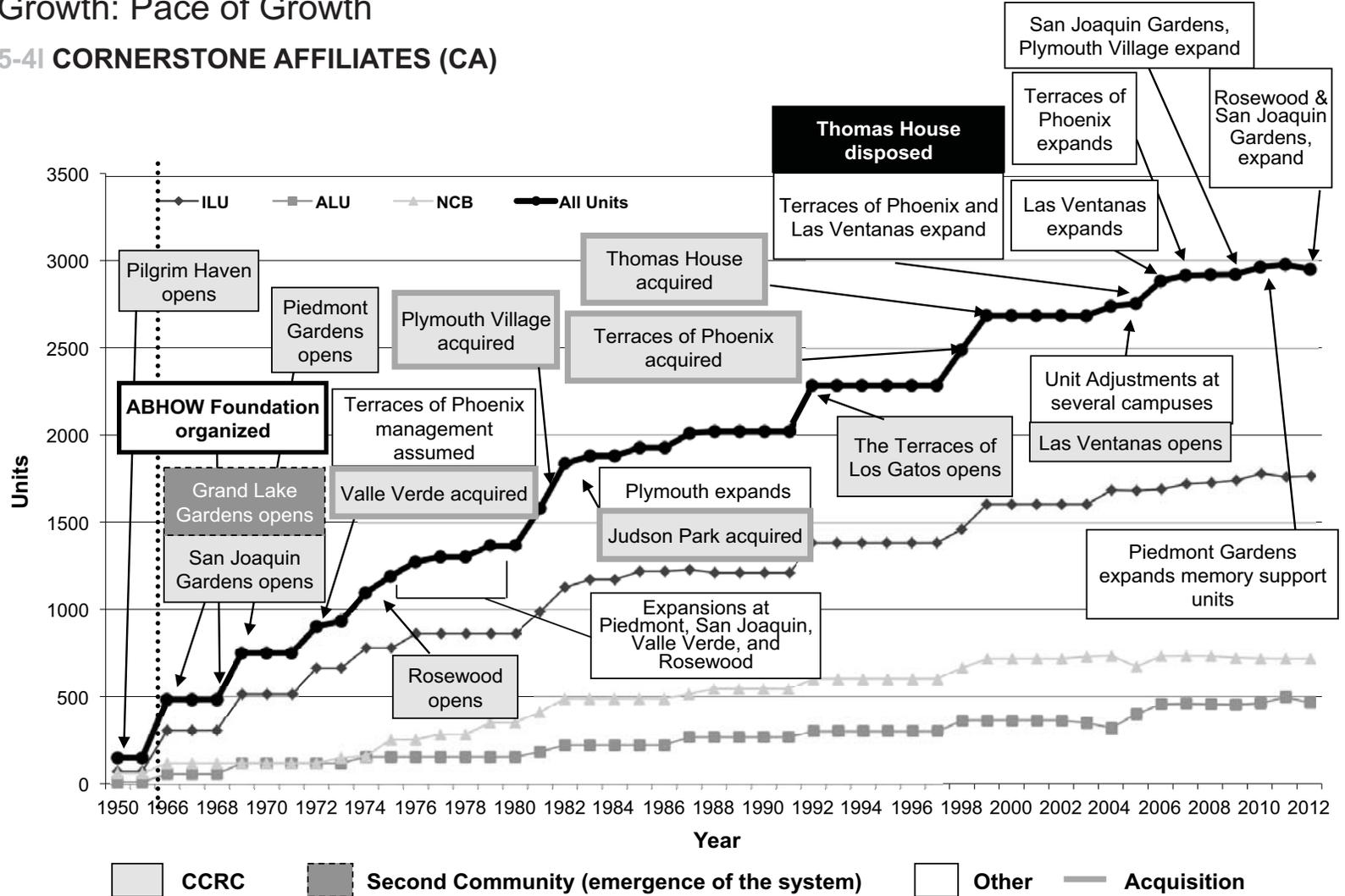
5-4k OHIO PRESBYTERIAN RETIREMENT SERVICES (OH)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

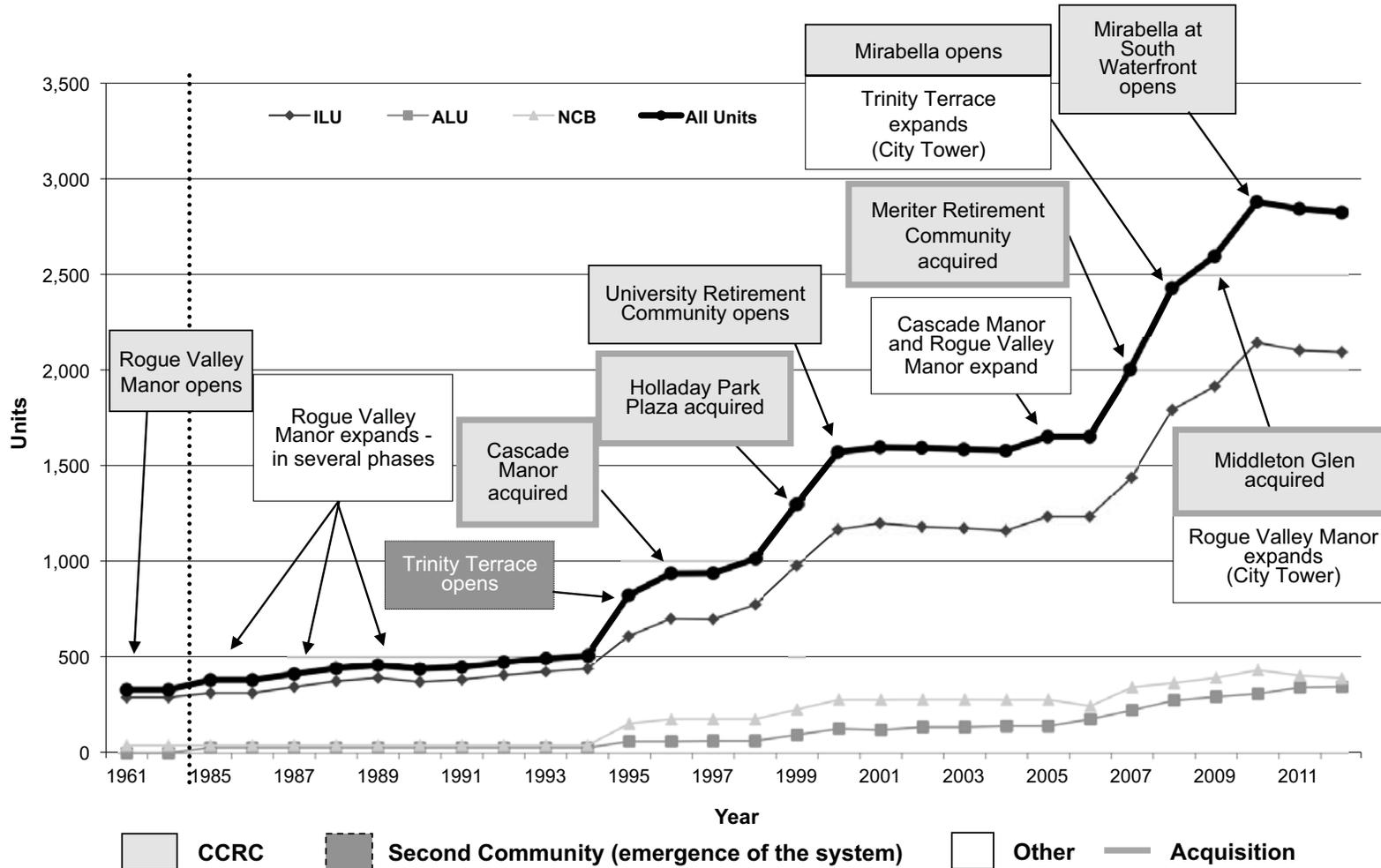
5-4I CORNERSTONE AFFILIATES (CA)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

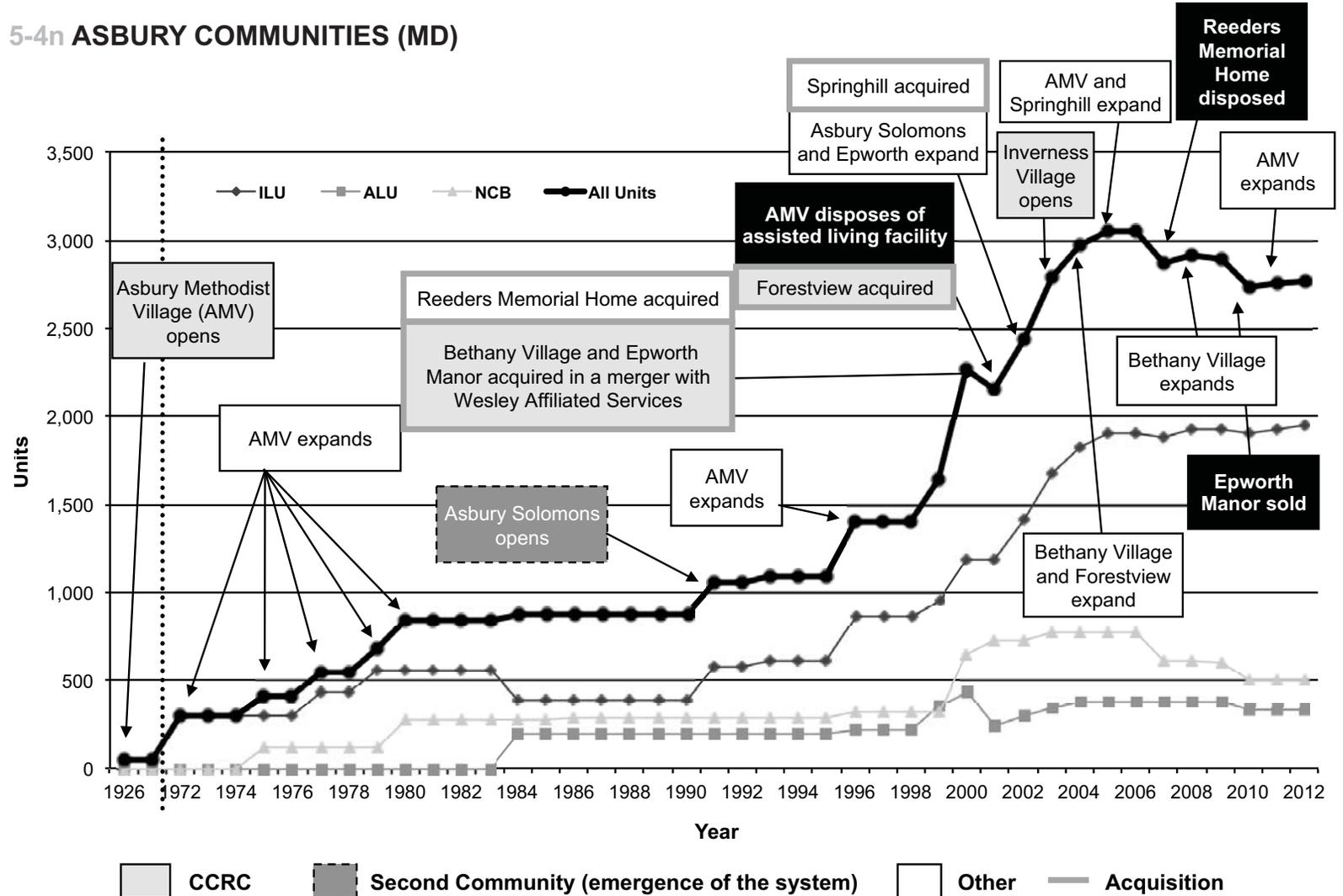
5-4m PACIFIC RETIREMENT SERVICES (OR)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

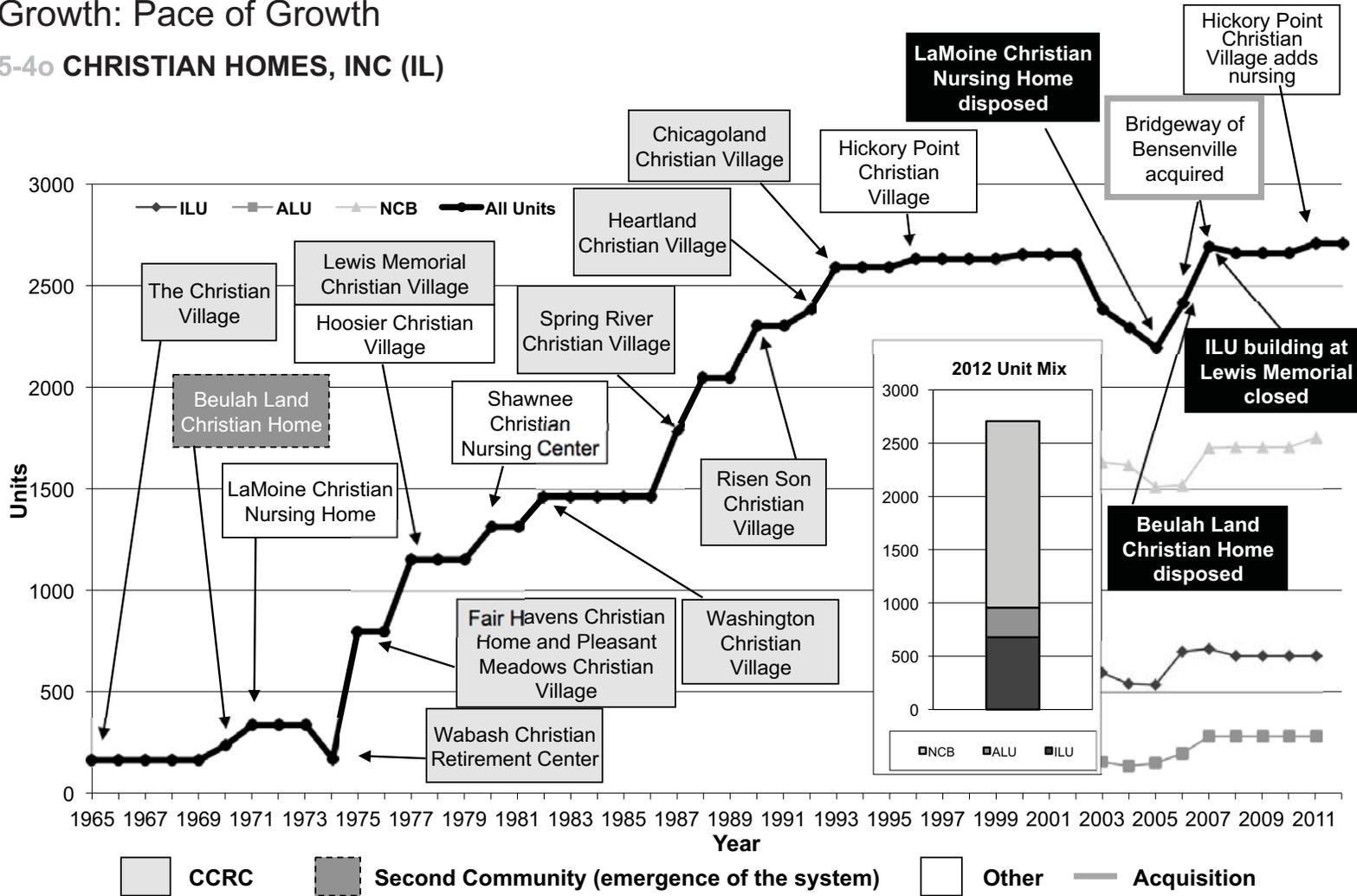
5-4n ASBURY COMMUNITIES (MD)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4o CHRISTIAN HOMES, INC (IL)

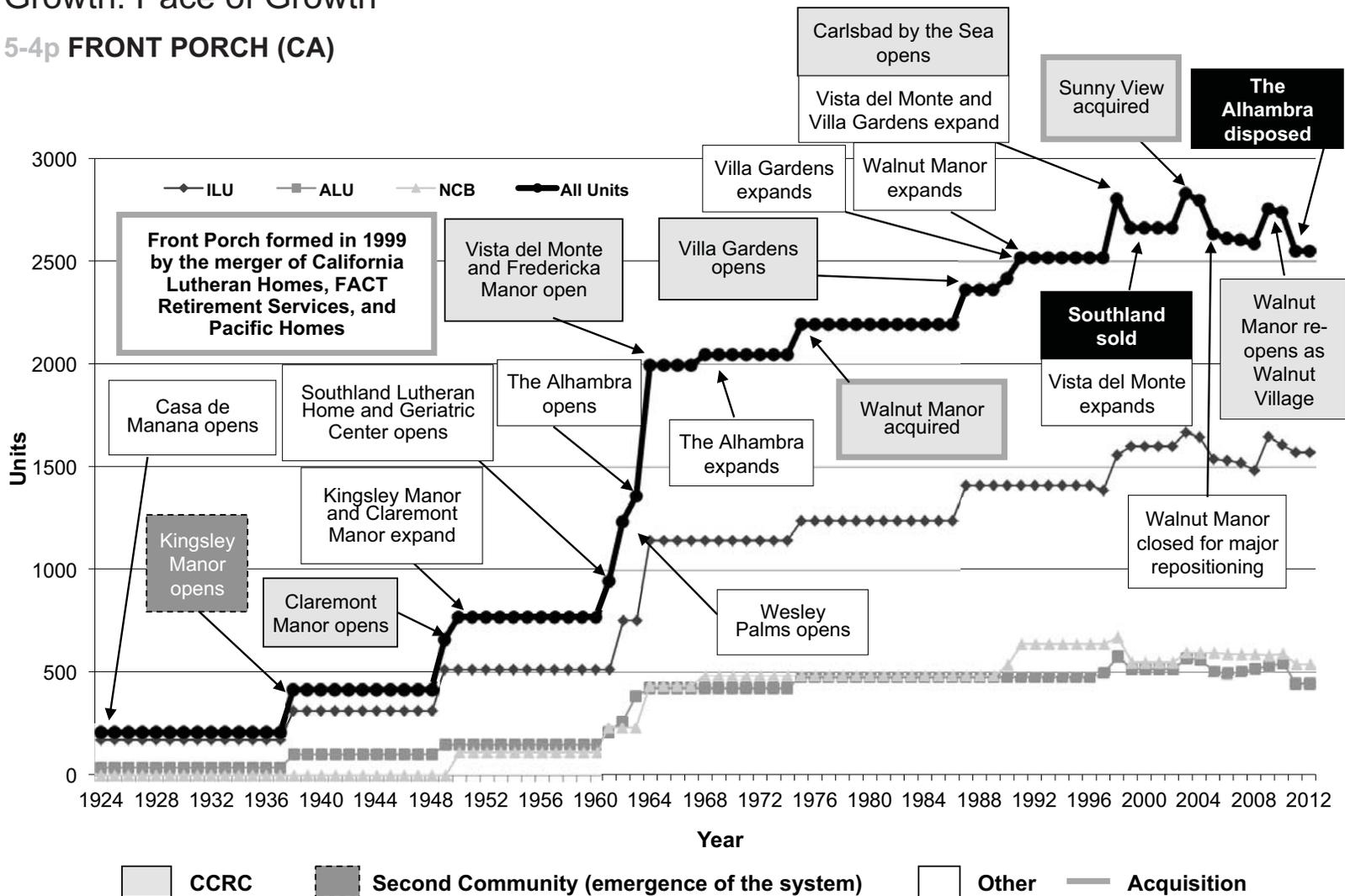


* All text refers to opening dates. Unit mix shown as of 12/31/2003, due to lack of detail in early years.

5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4p FRONT PORCH (CA)

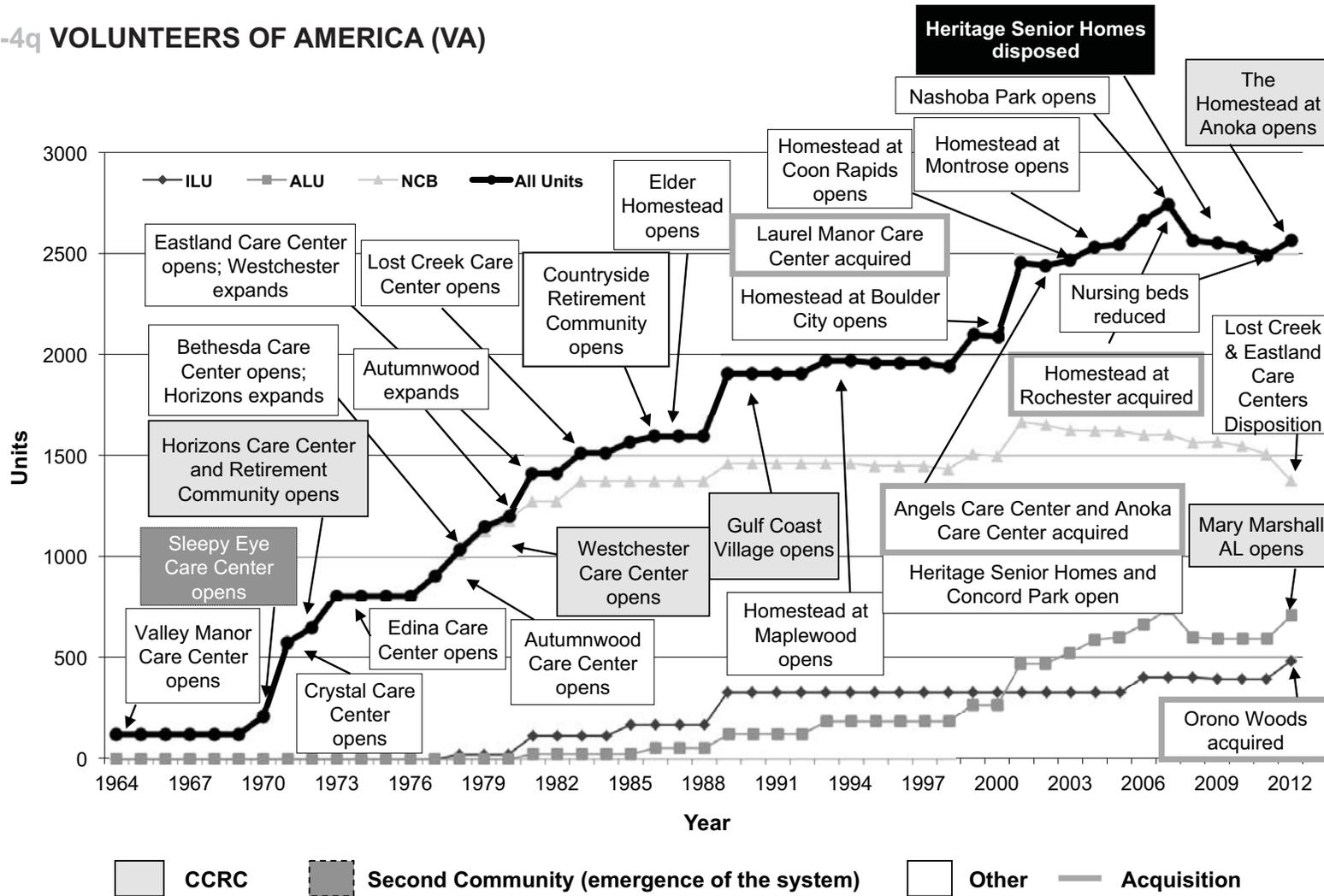


CCRC
 Second Community (emergence of the system)
 Other
 Acquisition

5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

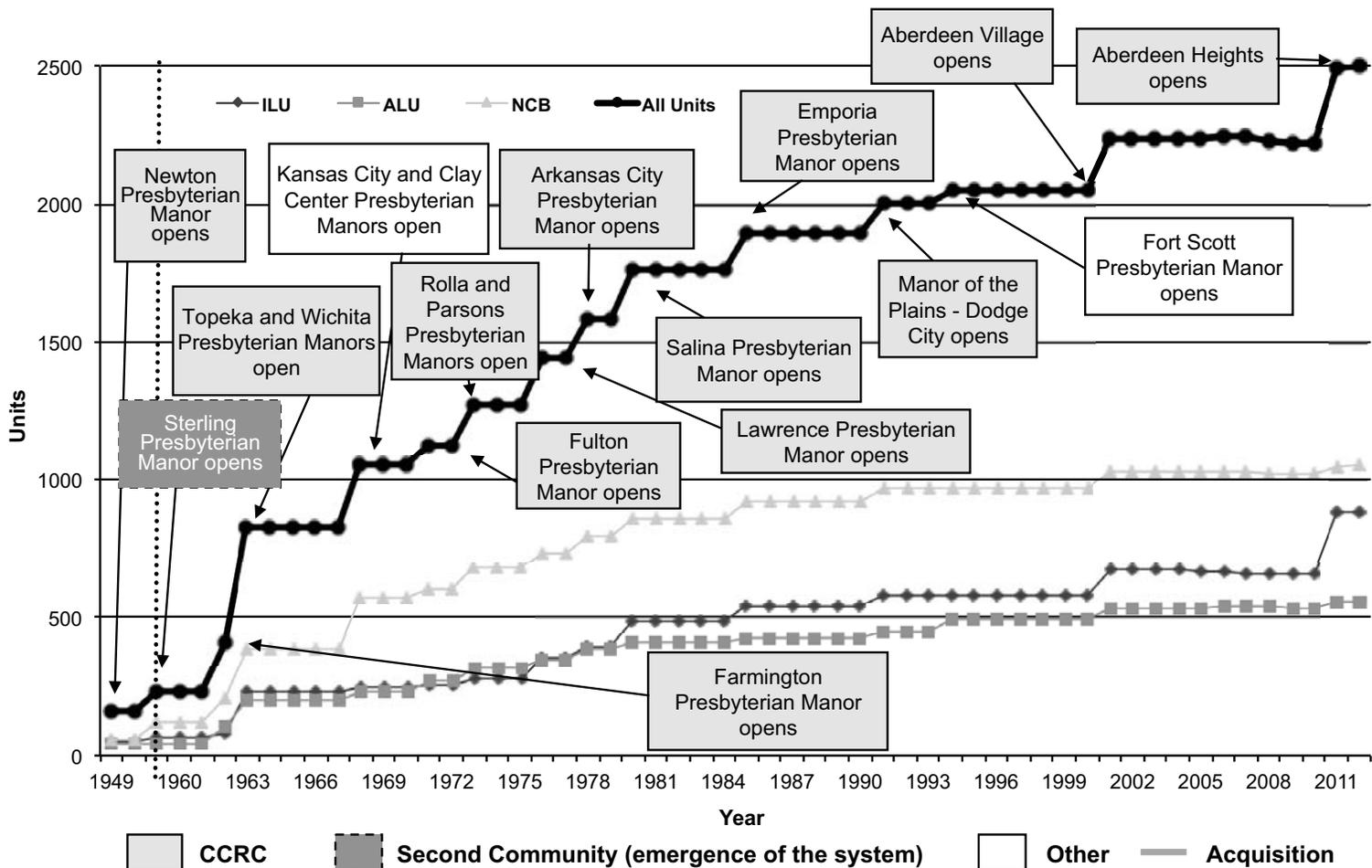
5-4q VOLUNTEERS OF AMERICA (VA)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

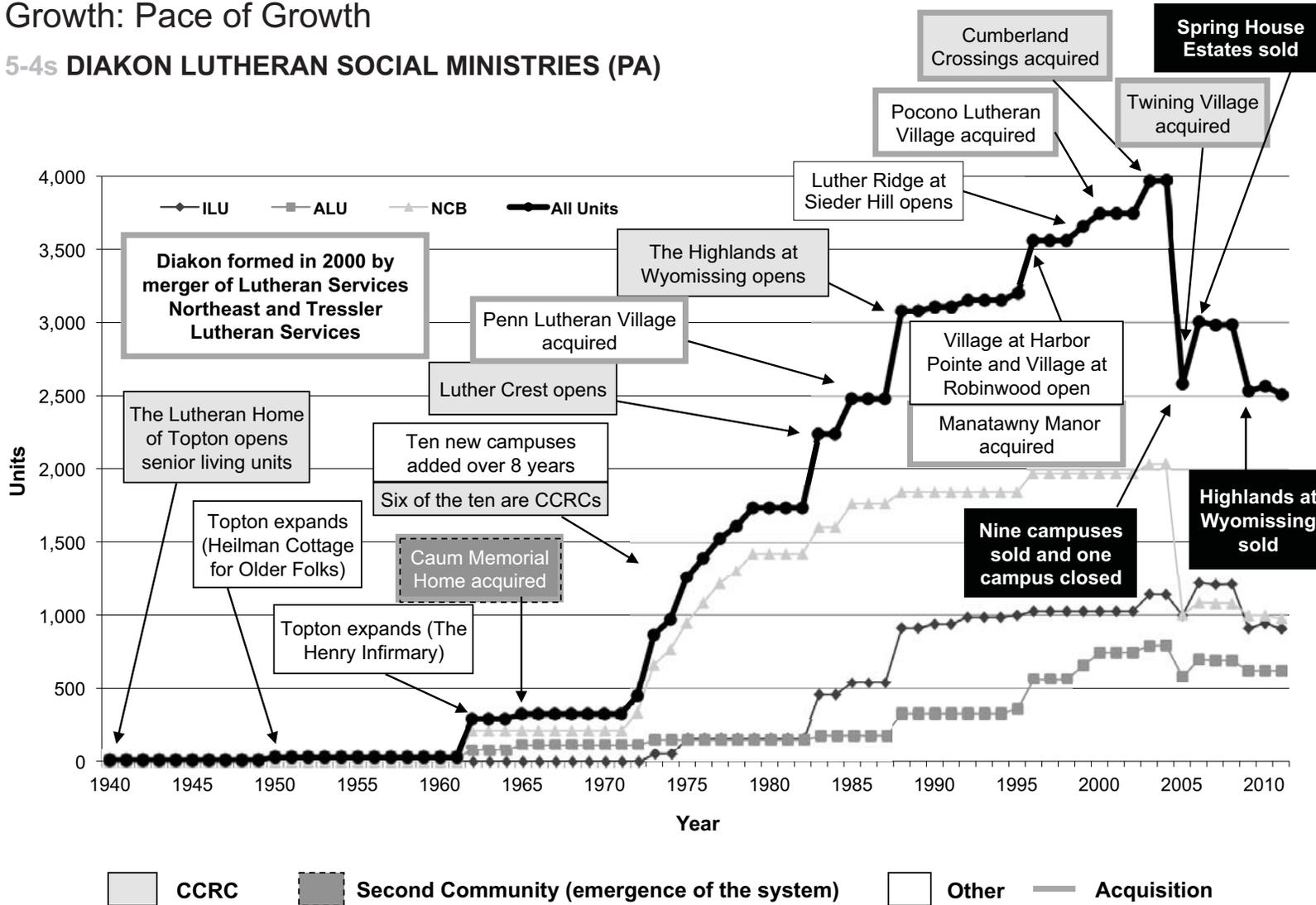
5-4r PRESBYTERIAN MANORS OF MID-AMERICA (KS)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

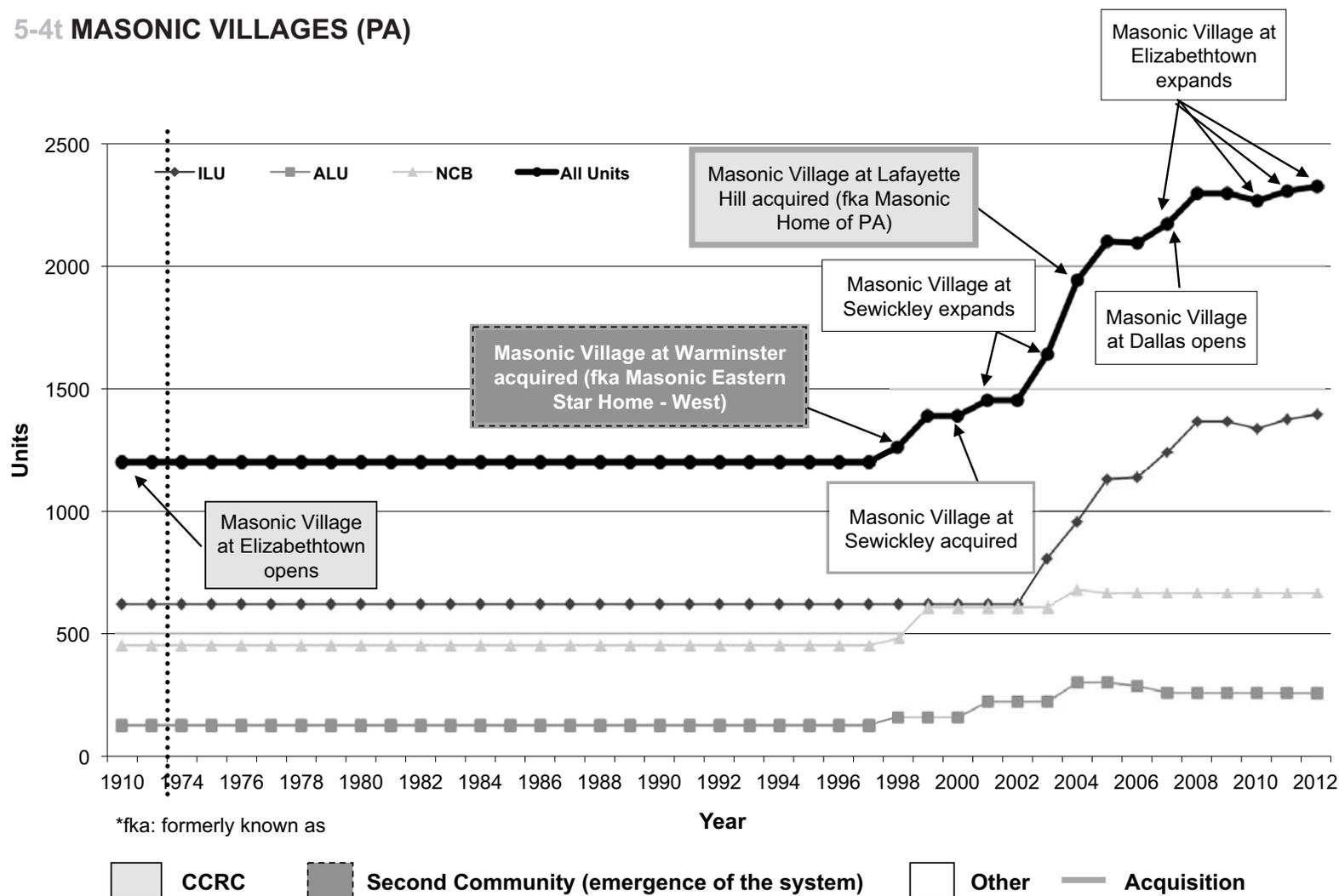
5-4s DIAKON LUTHERAN SOCIAL MINISTRIES (PA)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

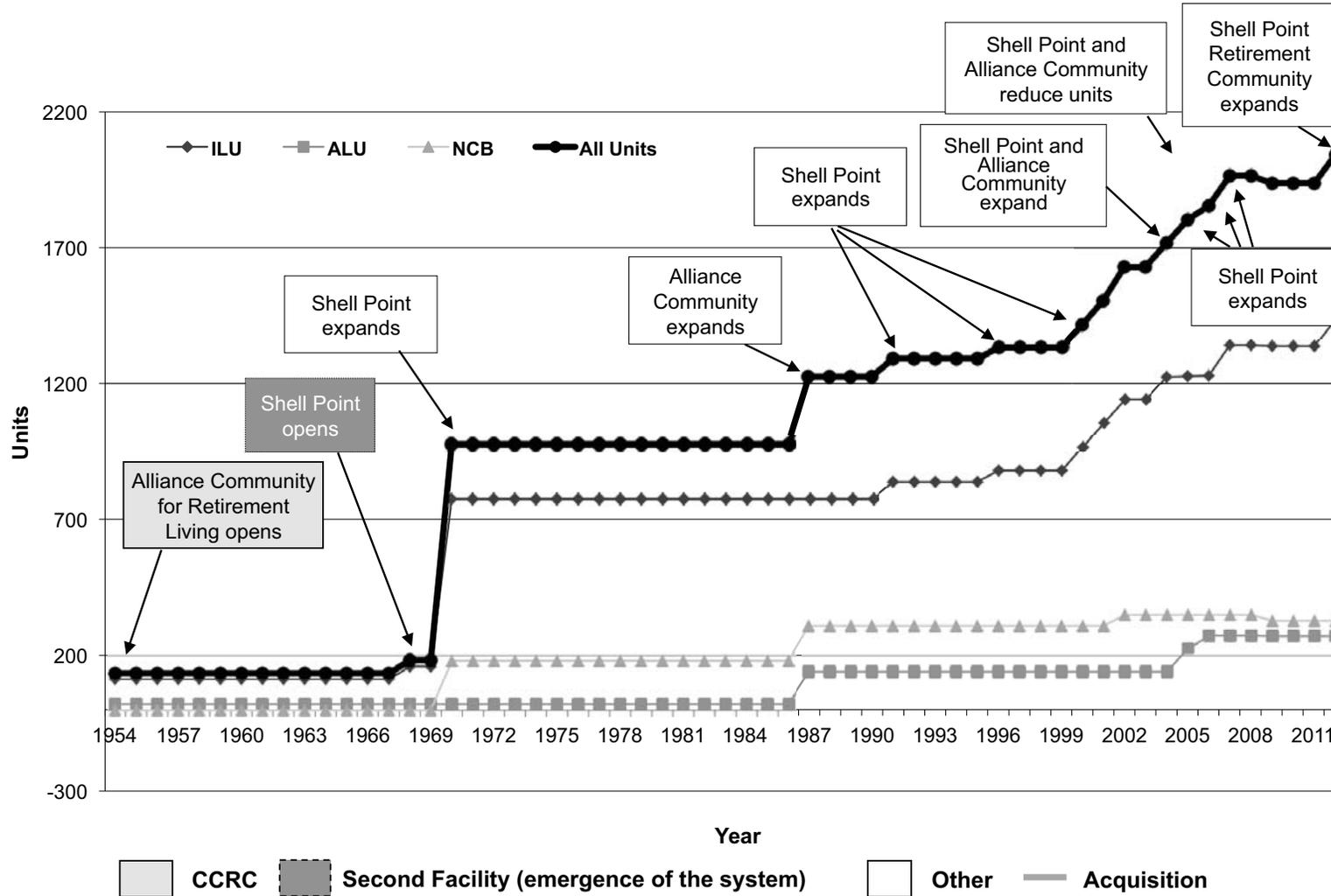
5-4t MASONIC VILLAGES (PA)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

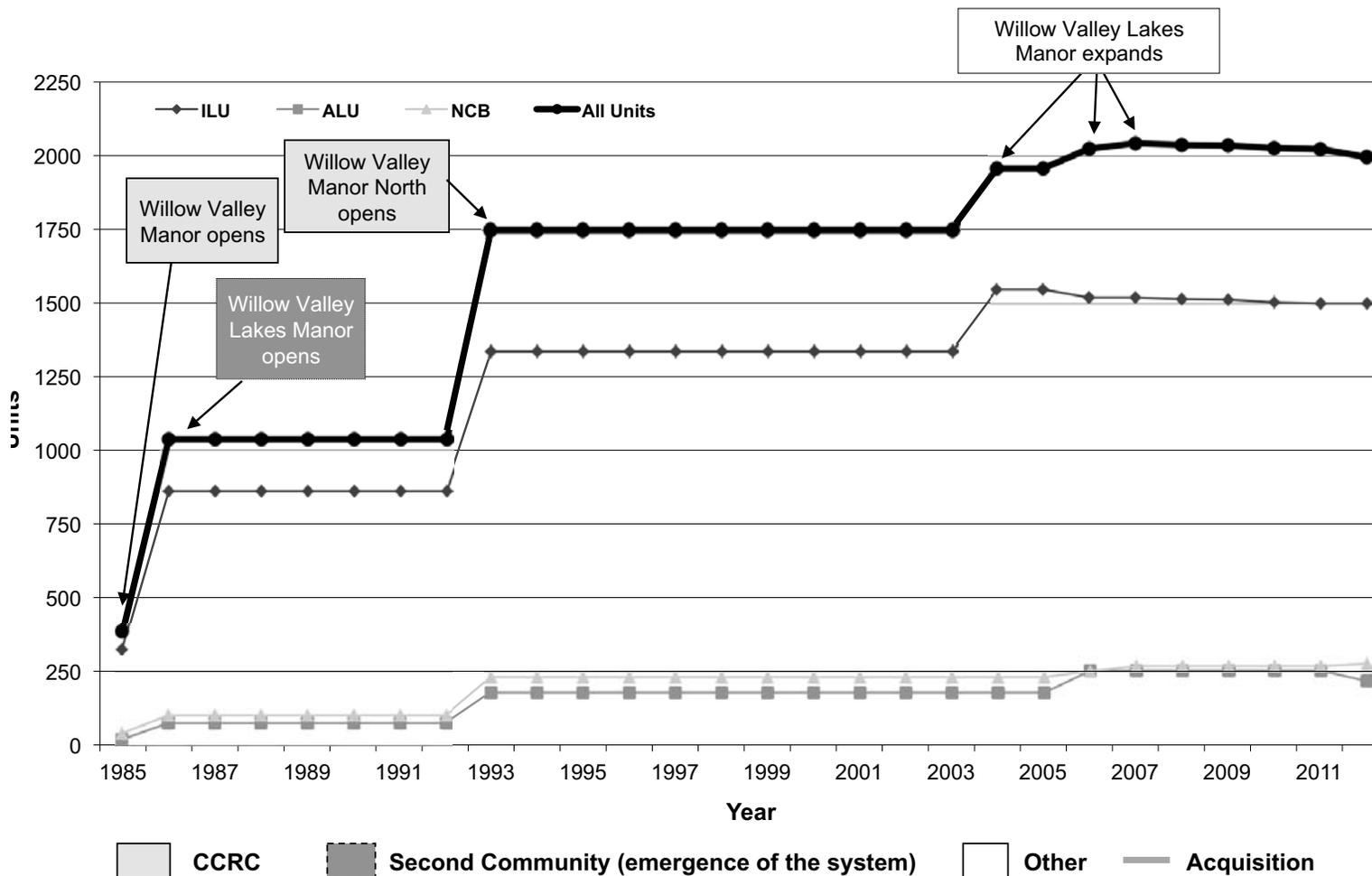
5-4u SHELL POINT RETIREMENT COMMUNITY (FL)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

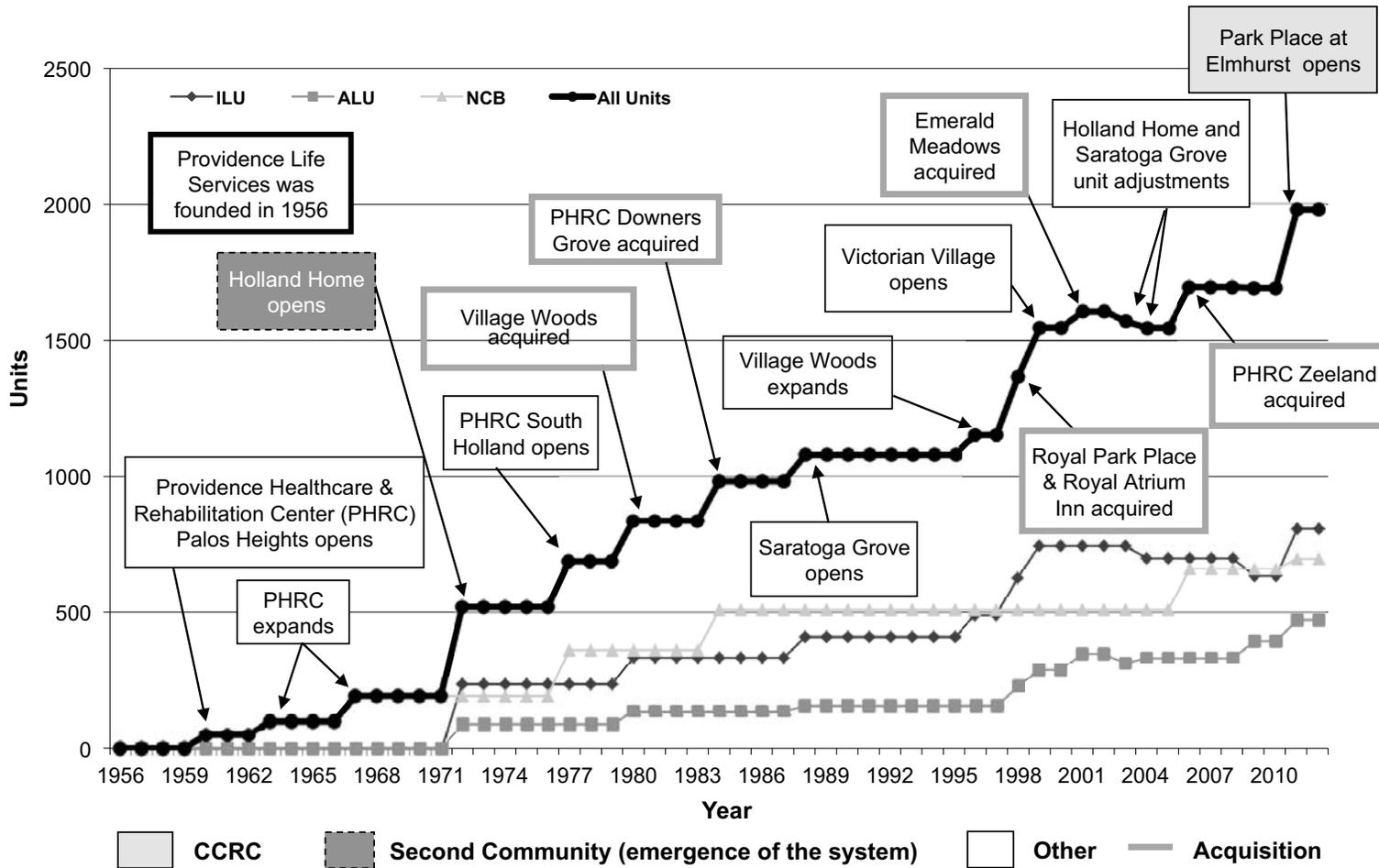
5-4v WILLOW VALLEY (PA)



5-4 2013 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4w PROVIDENCE LIFE SERVICES (IL)



5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5a OPENING OF FIRST COMMUNITY

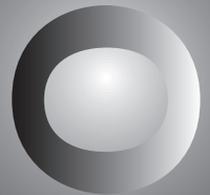
| System | State | 1st Community Opened | 2nd Community Opened | 3rd Community Opened | Years to Multi-site status | Years from 2 to 3 sites |
|---|-------|----------------------|----------------------|----------------------|----------------------------|-------------------------|
| Pre-1900, average years to multi-site status = 88 | | | | | | |
| Simpson Senior Services | PA | 1865 | 2000 | 2002 | 135 | 2 |
| St. Ann's Community | NY | 1873 | 2005 | - | 132 | 0 |
| Concordia Lutheran Ministries | PA | 1881 | 2003 | 2003 | 122 | 0 |
| Covenant Retirement Communities | IL | 1886 | 1962 | 1964 | 76 | 2 |
| Holland Home | MI | 1892 | 1975 | 1990 | 83 | 15 |
| Lutheran Life Communities | IL | 1892 | 2000 | 2005 | 108 | 5 |
| Lutheran Homes of South Carolina | SC | 1892 | 1911 | 1997 | 19 | 86 |
| Masonicare | CT | 1895 | 1972 | 1984 | 77 | 12 |
| Augustana Care Corporation | MN | 1896 | 1990 | 1998 | 94 | 8 |
| Franciscan Communities | IL | 1898 | 1940 | 1946 | 42 | 6 |
| 1900s, average years to multi-site status = 45 | | | | | | |
| Hebrew SeniorLife | MA | 1903 | 1994 | 2002 | 91 | 8 |
| Phoebe Ministries | PA | 1903 | 1992 | 1992 | 89 | 0 |
| Ecumen | MN | 1904 | 1917 | 1930 | 13 | 13 |
| Lutheran SeniorLife | PA | 1904 | 1980 | 1986 | 76 | 6 |
| Lutheran Senior Services | MO | 1906 | 1929 | 1967 | 23 | 38 |
| Elder Care Alliance | CA | 1906 | 1924 | 2001 | 18 | 77 |
| Westminster Ingleside Retirement Communities | DC | 1907 | 1917 | 1960 | 10 | 43 |
| Front Porch | CA | 1908 | 1912 | 1947 | 4 | 35 |
| 1910s, average years to multi-site status = 67 | | | | | | |
| Masonic Villages | PA | 1910 | 1998 | 1999 | 88 | 1 |
| United Methodist Memorial Home | IN | 1910 | 2001 | 2009 | 91 | 8 |
| Otterbein Senior Lifestyle Choices | OH | 1912 | 1981 | 1987 | 69 | 6 |
| Los Angeles Jewish Home for the Aged | CA | 1912 | 1976 | 1990 | 64 | 14 |
| Western Home Communities | IA | 1912 | <i>u</i> | <i>u</i> | - | - |
| Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 1913 | 1965 | 1965 | 52 | 0 |
| Presbyterian Homes | IL | 1914 | 1985 | 1998 | 71 | 13 |
| Living Branches | PA | 1917 | 1945 | 1981 | 28 | 36 |

5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5a OPENING OF FIRST COMMUNITY

| System | State | 1st Community Opened | 2nd Community Opened | 3rd Community Opened | Years to Multi-site status | Years from 2 to 3 sites |
|---|-------|----------------------|----------------------|----------------------|----------------------------|-------------------------|
| 1920s, average years to multi-site status = 32 | | | | | | |
| United Church Homes | OH | 1920 | 1964 | 1966 | 44 | 2 |
| Ohio Presbyterian Retirement Services | OH | 1922 | 1953 | 1956 | 31 | 3 |
| Evangelical Lutheran Good Samaritan Society | SD | 1923 | 1926 | 1935 | 3 | 9 |
| Asbury Communities | MD | 1926 | 1996 | 2000 | 70 | 4 |
| Bethesda Health Group, Inc. | MO | 1926 | 1989 | 1990 | 63 | 1 |
| Elim Care | MN | 1927 | 1968 | 1968 | 41 | 0 |
| Springpoint Senior Living | NJ | 1927 | 1952 | 1965 | 25 | 13 |
| Presbyterian Senior Living | PA | 1928 | 1934 | 1938 | 6 | 4 |
| The Eddy | NY | 1928 | 1985 | 1989 | 57 | 4 |
| 1930s, average years to multi-site status = 34 | | | | | | |
| Wesley Enhanced Living | PA | 1930 | 1985 | 1995 | 55 | 10 |
| American Baptist Homes of the Midwest | MN | 1931 | 1958 | 1960 | 27 | 2 |
| Homewood Retirement Centers | MD | 1932 | 1953 | 1957 | 21 | 4 |
| 1940s, average years to multi-site status = 17 | | | | | | |
| Diakon Lutheran Social Ministries | PA | 1940 | 1952 | 1961 | 12 | 9 |
| WesleyLife | IA | 1947 | 1960 | 1962 | 13 | 2 |
| Christian Care Centers | TX | 1947 | 1973 | 1982 | 26 | 9 |
| Virginia United Methodist Homes, Inc. | VA | 1948 | 1948 | 1960 | 0 | 12 |
| Presbyterian Manors of Mid-America | KS | 1949 | 1959 | 1962 | 10 | 3 |
| Presbyterian SeniorCare | PA | 1949 | 1960 | 1992 | 11 | 32 |
| United Methodist Homes of New Jersey | NJ | 1949 | 1961 | 1963 | 12 | 2 |
| Oakwood Lutheran Senior Ministries | WI | 1949 | 2000 | - | 51 | 0 |



5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5a OPENING OF FIRST COMMUNITY

| System | State | 1st Community Opened | 2nd Community Opened | 3rd Community Opened | Years to Multi-site status | Years from 2 to 3 sites |
|---|-------|----------------------|----------------------|----------------------|----------------------------|-------------------------|
| 1950s, average years to multi-site status = 18 | | | | | | |
| Cornerstone Affiliates | CA | 1950 | 1966 | 1966 | 16 | 0 |
| Virginia Baptist Homes | VA | 1951 | 1969 | 1978 | 18 | 9 |
| Presbyterian Villages of Michigan | MI | 1952 | 1978 | 1989 | 26 | 11 |
| The Presbyterian Homes, Inc. of North Carolina | NC | 1952 | 1988 | 1993 | 36 | 5 |
| Mather LifeWays | IL | 1952 | 1989 | 1990 | 37 | 1 |
| LutherCare | PA | 1953 | 1966 | 1991 | 13 | 25 |
| Buckner Retirement Services, Inc. | TX | 1954 | 1955 | 1970 | 1 | 15 |
| Presbyterian Homes and Services | MN | 1955 | 1986 | 1986 | 31 | 0 |
| Presby's Inspired Life | PA | 1955 | 1964 | 1975 | 9 | 11 |
| be.group | CA | 1956 | 1959 | 1961 | 3 | 2 |
| VMP | WI | 1956 | 2000 | 2004 | 44 | 4 |
| Cedar Community | WI | 1957 | 1986 | 2000 | 29 | 14 |
| Shell Point | FL | 1958 | 1968 | - | 10 | 0 |
| Baptist Village Retirement Communities of Oklahoma | OK | 1958 | 1965 | 1977 | 7 | 12 |
| Presbyterian Communities of South Carolina | SC | 1958 | 1975 | 1976 | 17 | 1 |
| Lutheran Social Services of South Central Pennsylvan | PA | 1959 | 1970 | 1979 | 11 | 9 |
| United Methodist Homes | NY | 1959 | 1961 | 1963 | 2 | 2 |
| 1960s, average years to multi-site status = 14 | | | | | | |
| Providence Life Services | IL | 1960 | 1972 | 1977 | 12 | 5 |
| Westminster Communities of Florida | FL | 1961 | 1965 | 1971 | 4 | 6 |
| Pacific Retirement Services, Inc. | OR | 1961 | 1995 | 1996 | 34 | 1 |
| National Church Residences | OH | 1961 | u | u | - | - |
| Northern California Presbyterian Homes and Services | CA | 1961 | 1969 | 1969 | 8 | 0 |
| Morningside Ministries | TX | 1961 | 1977 | 2004 | 16 | 27 |
| Lutheran Services for the Aging | NC | 1962 | 1971 | 1976 | 9 | 5 |
| Presbyterian Communities and Services | TX | 1962 | 1980 | - | 18 | 0 |
| Magnolia Manor, Inc. | GA | 1963 | 1983 | 1991 | 20 | 8 |
| Volunteers of America | VA | 1964 | 1970 | 1971 | 6 | 1 |
| Menno Haven | PA | 1964 | 1991 | 2003 | 27 | 12 |
| Retirement Housing Foundation | CA | 1965 | 1970 | 1970 | 5 | 0 |
| Christian Homes, Inc. | IL | 1965 | 1970 | 1971 | 5 | 1 |
| Episcopal Senior Communities | CA | 1965 | 1966 | 1971 | 1 | 5 |
| Mississippi Methodist Senior Services | MS | 1966 | 1966 | 1978 | 0 | 12 |
| Sears Methodist Retirement System, Inc. | TX | 1966 | 1992 | 1993 | 26 | 1 |
| Greencroft | IN | 1967 | 2004 | 2006 | 37 | 2 |
| Goodwin House Incorporated | VA | 1967 | 1987 | - | 20 | 0 |

5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

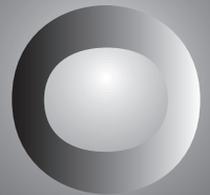
5-5a OPENING OF FIRST COMMUNITY

| System | State | 1st Community Opened | 2nd Community Opened | 3rd Community Opened | Years to Multi-site status | Years from 2 to 3 sites |
|---|-------|----------------------|----------------------|----------------------|----------------------------|-------------------------|
| 1970s, average years to multi-site status = 9 | | | | | | |
| Air Force Villages | TX | 1970 | 1987 | 1998 | 17 | 11 |
| Loretto (Catholic Charities, Diocese of Syracuse) | NY | 1971 | 1993 | 1999 | 22 | 6 |
| United Church Homes & Services | NC | 1971 | 1986 | 2000 | 15 | 14 |
| ACTS Retirement-Life Communities, Inc. | PA | 1972 | 1976 | 1977 | 4 | 1 |
| The Kendal Corporation | PA | 1973 | 1977 | 1981 | 4 | 4 |
| Eskaton | CA | 1973 | 1974 | 1977 | 1 | 3 |
| Friendship Senior Options | IL | 1977 | 2012 | - | 35 | 0 |
| United Methodist Retirement Homes, Inc. | NC | 1977 | 1987 | 1999 | 10 | 12 |
| Lifespace Communities, Inc. | IA | 1978 | 1979 | 1982 | 1 | 3 |
| Givens Estates Retirement Community | NC | 1979 | 2012 | - | 33 | 0 |
| 1980s, average years to multi-site status = 10 | | | | | | |
| EMA, Inc. | MD | 1980 | 1994 | 1999 | 14 | 5 |
| Christian Care Companies | AZ | 1981 | 1996 | 1998 | 15 | 2 |
| Walker Methodist | MN | 1982 | 1988 | 1990 | 6 | 2 |
| Willow Valley Retirement Communities | PA | 1985 | 1986 | 1993 | 1 | 7 |
| Elant | NY | 1985 | 1996 | 1998 | 11 | 2 |
| SantaFe Senior Living | FL | 1986 | 2006 | 2008 | 20 | 2 |
| 1990s, average years to multi-site status = 6 | | | | | | |
| Bethesda Senior Living Communities | CO | 1990 | 1993 | 1995 | 3 | 2 |
| National Senior Campuses | MD | 1995 | 1998 | 1998 | 3 | 0 |
| 2000s, average years to multi-site status = 4 | | | | | | |
| Senior Quality Lifestyles Corporation | TX | 2001 | 2005 | 2007 | 4 | 2 |

u = unknown

* When an organization begins by opening two communities in the same year the "Years to Multi-site status" is zero.

LeadingAge



Ziegler

5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5b OPENING OF SECOND COMMUNITY

| System | State | 1st Community Open | 2nd Community Open | 3rd Community Open | Years to Multi-site status | Years from 2 to 3 sites |
|--|-------|--------------------|--------------------|--------------------|----------------------------|-------------------------|
| 1910s | | | | | | |
| Lutheran Homes of South Carolina | SC | 1892 | 1911 | 1997 | 19 | 86 |
| Front Porch | CA | 1908 | 1912 | 1947 | 4 | 35 |
| Ecumen | MN | 1904 | 1917 | 1930 | 13 | 13 |
| Westminster Ingleside Retirement Communities | DC | 1907 | 1917 | 1960 | 10 | 43 |
| 1920s | | | | | | |
| Elder Care Alliance | CA | 1906 | 1924 | 2001 | 18 | 77 |
| Evangelical Lutheran Good Samaritan Society | SD | 1923 | 1926 | 1935 | 3 | 9 |
| Lutheran Senior Services | MO | 1906 | 1929 | 1967 | 23 | 38 |
| 1930s | | | | | | |
| Presbyterian Senior Living | PA | 1928 | 1934 | 1938 | 6 | 4 |
| 1940s | | | | | | |
| Franciscan Communities | IL | 1898 | 1940 | 1946 | 42 | 6 |
| Living Branches | PA | 1917 | 1945 | 1981 | 28 | 36 |
| Virginia United Methodist Homes, Inc. | VA | 1948 | 1948 | 1960 | 0 | 12 |
| 1950s | | | | | | |
| Springpoint Senior Living | NJ | 1927 | 1952 | 1965 | 25 | 13 |
| Diakon Lutheran Social Ministries | PA | 1940 | 1952 | 1961 | 12 | 9 |
| Ohio Presbyterian Retirement Services | OH | 1922 | 1953 | 1956 | 31 | 3 |
| Homewood Retirement Centers | MD | 1932 | 1953 | 1957 | 21 | 4 |
| Buckner Retirement Services, Inc. | TX | 1954 | 1955 | 1970 | 1 | 15 |
| American Baptist Homes of the Midwest | MN | 1931 | 1958 | 1960 | 27 | 2 |
| Presbyterian Manors of Mid-America | KS | 1949 | 1959 | 1962 | 10 | 3 |
| be.group | CA | 1956 | 1959 | 1961 | 3 | 2 |

5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5b OPENING OF SECOND COMMUNITY

| System | State | 1st Community Open | 2nd Community Open | 3rd Community Open | Years to Multi-site status | Years from 2 to 3 sites |
|---|-------|--------------------|--------------------|--------------------|----------------------------|-------------------------|
| 1960s | | | | | | |
| WesleyLife | IA | 1947 | 1960 | 1962 | 13 | 2 |
| Presbyterian SeniorCare | PA | 1949 | 1960 | 1992 | 11 | 32 |
| United Methodist Homes of New Jersey | NJ | 1949 | 1961 | 1963 | 12 | 2 |
| United Methodist Homes | NY | 1959 | 1961 | 1963 | 2 | 2 |
| Covenant Retirement Communities | IL | 1886 | 1962 | 1964 | 76 | 2 |
| United Church Homes | OH | 1920 | 1964 | 1966 | 44 | 2 |
| Presby's Inspired Life | PA | 1955 | 1964 | 1975 | 9 | 11 |
| Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 1913 | 1965 | 1965 | 52 | 0 |
| Baptist Village Retirement Communities of Oklahoma | OK | 1958 | 1965 | 1977 | 7 | 12 |
| Westminster Communities of Florida | FL | 1961 | 1965 | 1971 | 4 | 6 |
| Cornerstone Affiliates | CA | 1950 | 1966 | 1966 | 16 | 0 |
| LutherCare | PA | 1953 | 1966 | 1991 | 13 | 25 |
| Episcopal Senior Communities | CA | 1965 | 1966 | 1971 | 1 | 5 |
| Mississippi Methodist Senior Services | MS | 1966 | 1966 | 1978 | 0 | 12 |
| Elim Care | MN | 1927 | 1968 | 1968 | 41 | 0 |
| Shell Point | FL | 1958 | 1968 | - | 10 | - |
| Virginia Baptist Homes | VA | 1951 | 1969 | 1978 | 18 | 9 |
| Northern California Presbyterian Homes and Services | CA | 1961 | 1969 | 1969 | 8 | 0 |
| 1970s | | | | | | |
| Lutheran Social Services of South Central Pennsylvania | PA | 1959 | 1970 | 1979 | 11 | 9 |
| Volunteers of America | VA | 1964 | 1970 | 1971 | 6 | 1 |
| Retirement Housing Foundation | CA | 1965 | 1970 | 1970 | 5 | 0 |
| Christian Homes, Inc. | IL | 1965 | 1970 | 1971 | 5 | 1 |
| Lutheran Services for the Aging | NC | 1962 | 1971 | 1976 | 9 | 5 |
| Masonicare | CT | 1895 | 1972 | 1984 | 77 | 12 |
| Providence Life Services | IL | 1960 | 1972 | 1977 | 12 | 5 |
| Christian Care Centers | TX | 1947 | 1973 | 1982 | 26 | 9 |
| Eskaton | CA | 1973 | 1974 | 1977 | 1 | 3 |
| Holland Home | MI | 1892 | 1975 | 1990 | 83 | 15 |
| Presbyterian Communities of South Carolina | SC | 1958 | 1975 | 1976 | 17 | 1 |
| Los Angeles Jewish Home for the Aged | CA | 1912 | 1976 | 1990 | 64 | 14 |
| ACTS Retirement-Life Communities, Inc. | PA | 1972 | 1976 | 1977 | 4 | 1 |
| Morningside Ministries | TX | 1961 | 1977 | 2004 | 16 | 27 |
| The Kendal Corporation | PA | 1973 | 1977 | 1981 | 4 | 4 |
| Presbyterian Villages of Michigan | MI | 1952 | 1978 | 1989 | 26 | 11 |
| Lifespace Communities, Inc. | IA | 1978 | 1979 | 1982 | 1 | 3 |

5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5b OPENING OF SECOND COMMUNITY

| System | State | 1st Community Open | 2nd Community Open | 3rd Community Open | Years to Multi-site status | Years from 2 to 3 sites |
|---|-------|--------------------|--------------------|--------------------|----------------------------|-------------------------|
| 1980s | | | | | | |
| Lutheran SeniorLife | PA | 1904 | 1980 | 1986 | 76 | 6 |
| Presbyterian Communities and Services | TX | 1962 | 1980 | - | 18 | - |
| Otterbein Senior Lifestyle Choices | OH | 1912 | 1981 | 1987 | 69 | 6 |
| Magnolia Manor, Inc. | GA | 1963 | 1983 | 1991 | 20 | 8 |
| Presbyterian Homes | IL | 1914 | 1985 | 1998 | 71 | 13 |
| The Eddy | NY | 1928 | 1985 | 1989 | 57 | 4 |
| Wesley Enhanced Living | PA | 1930 | 1985 | 1995 | 55 | 10 |
| Presbyterian Homes and Services | MN | 1955 | 1986 | 1986 | 31 | 0 |
| Cedar Community | WI | 1957 | 1986 | 2000 | 29 | 14 |
| United Church Homes & Services | NC | 1971 | 1986 | 2000 | 15 | 14 |
| Willow Valley Retirement Communities | PA | 1985 | 1986 | 1993 | 1 | 7 |
| Goodwin House Incorporated | VA | 1967 | 1987 | - | 20 | - |
| Air Force Villages | TX | 1970 | 1987 | 1998 | 17 | 11 |
| United Methodist Retirement Homes, Inc. | NC | 1977 | 1987 | 1999 | 10 | 12 |
| The Presbyterian Homes, Inc. of North Carolina | NC | 1952 | 1988 | 1993 | 36 | 5 |
| Walker Methodist | MN | 1982 | 1988 | 1990 | 6 | 2 |
| Western Home Communities | IA | 1912 | u | u | - | - |
| Bethesda Health Group, Inc. | MO | 1926 | 1989 | 1990 | 63 | 1 |
| Mather LifeWays | IL | 1952 | 1989 | 1990 | 37 | 1 |
| 1990s | | | | | | |
| Augustana Care Corporation | MN | 1896 | 1990 | 1998 | 94 | 8 |
| Menno Haven | PA | 1964 | 1991 | 2003 | 27 | 12 |
| Phoebe Ministries | PA | 1903 | 1992 | 1992 | 89 | 0 |
| Sears Methodist Retirement System, Inc. | TX | 1966 | 1992 | 1993 | 26 | 1 |
| Loretto (Catholic Charities, Diocese of Syracuse) | NY | 1971 | 1993 | 1999 | 22 | 6 |
| Bethesda Senior Living Communities | CO | 1990 | 1993 | 1995 | 3 | 2 |
| Hebrew SeniorLife | MA | 1903 | 1994 | 2002 | 91 | 8 |
| EMA, Inc. | MD | 1980 | 1994 | 1999 | 14 | 5 |
| Pacific Retirement Services, Inc. | OR | 1961 | 1995 | 1996 | 34 | 1 |
| Asbury Communities | MD | 1926 | 1996 | 2000 | 70 | 4 |
| Christian Care Companies | AZ | 1981 | 1996 | 1998 | 15 | 2 |
| Elant | NY | 1985 | 1996 | 1998 | 11 | 2 |
| Masonic Villages | PA | 1910 | 1998 | 1999 | 88 | 1 |
| National Senior Campuses | MD | 1995 | 1998 | 1998 | 3 | 0 |

5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5b OPENING OF SECOND COMMUNITY

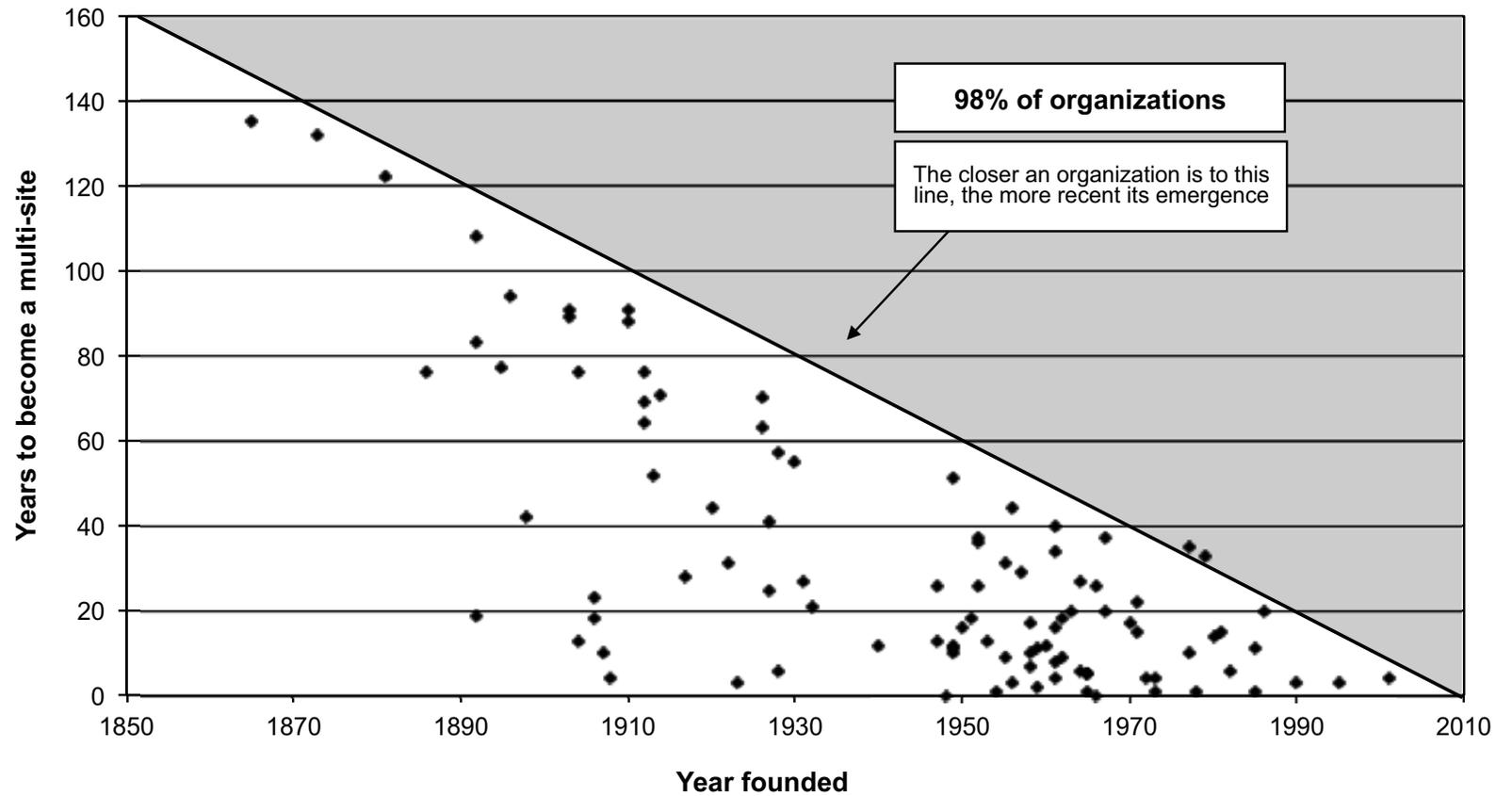
| System | State | 1st Community Open | 2nd Community Open | 3rd Community Open | Years to Multi-site status | Years from 2 to 3 sites |
|---------------------------------------|-------|--------------------|--------------------|--------------------|----------------------------|-------------------------|
| 2000s | | | | | | |
| Simpson Senior Services | PA | 1865 | 2000 | 2002 | 135 | 2 |
| Lutheran Life Communities | IL | 1892 | 2000 | 2005 | 108 | 5 |
| Oakwood Lutheran Senior Ministries | WI | 1949 | 2000 | - | 51 | - |
| VMP | WI | 1956 | 2000 | 2004 | 44 | 4 |
| United Methodist Memorial Home | IN | 1910 | 2001 | 2009 | 91 | 8 |
| National Church Residences | OH | 1961 | <i>u</i> | <i>u</i> | - | - |
| Concordia Lutheran Ministries | PA | 1881 | 2003 | 2003 | 122 | 0 |
| Greencroft | IN | 1967 | 2004 | 2006 | 37 | 2 |
| St. Ann's Community | NY | 1873 | 2005 | - | 132 | - |
| Senior Quality Lifestyles Corporation | TX | 2001 | 2005 | 2007 | 4 | 2 |
| SantaFe Senior Living | FL | 1986 | 2006 | 2008 | 20 | 2 |
| Friendship Senior Options | IL | 1977 | 2012 | - | 35 | - |
| Givens Estates Retirement Community | NC | 1979 | 2012 | - | 33 | - |

* When an organization begins by opening two communities in the same year the "Years to Multi-site status" is zero.

5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

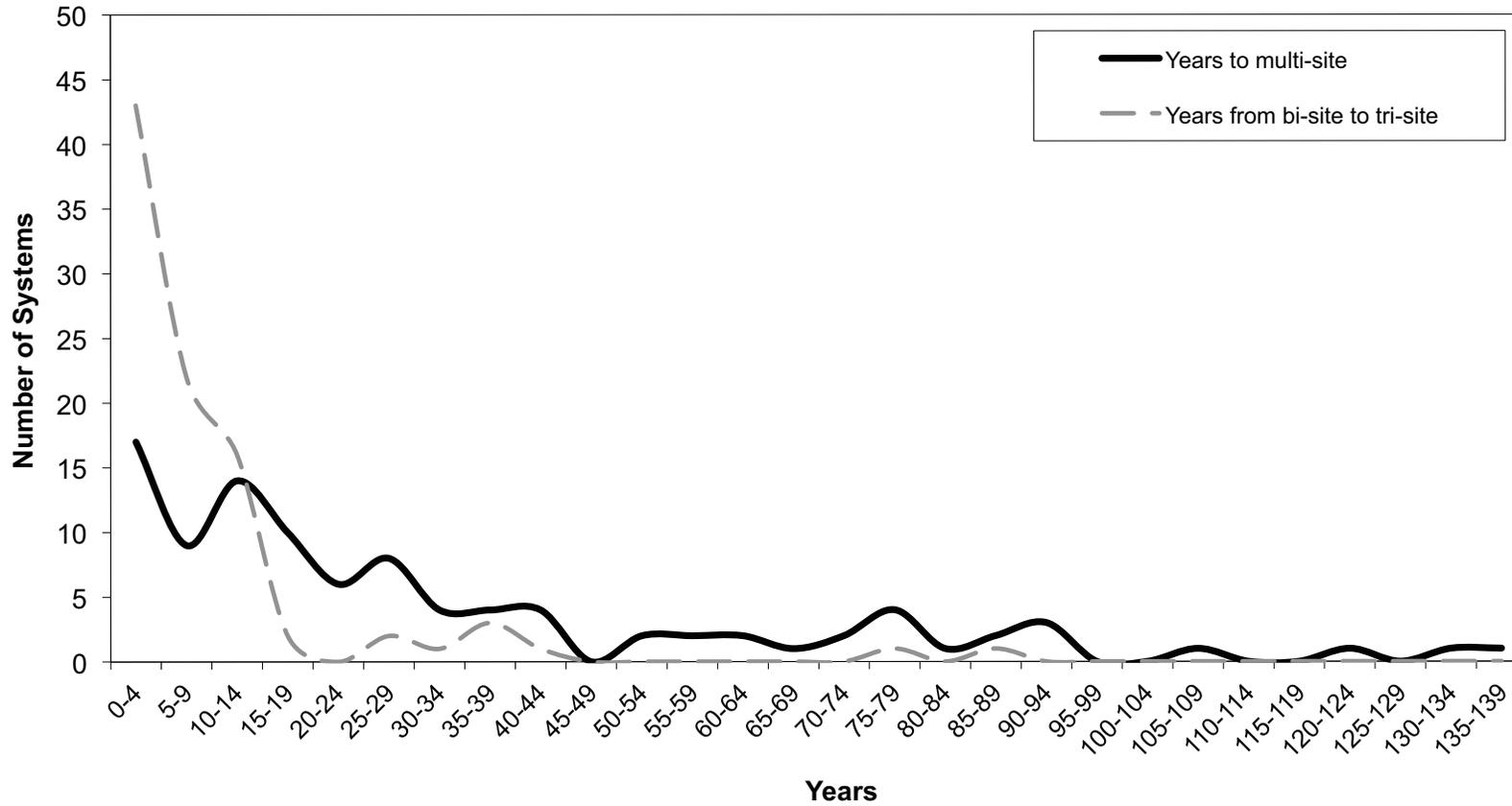
5-5c EMERGENCE OF ALL LZ 100s



5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

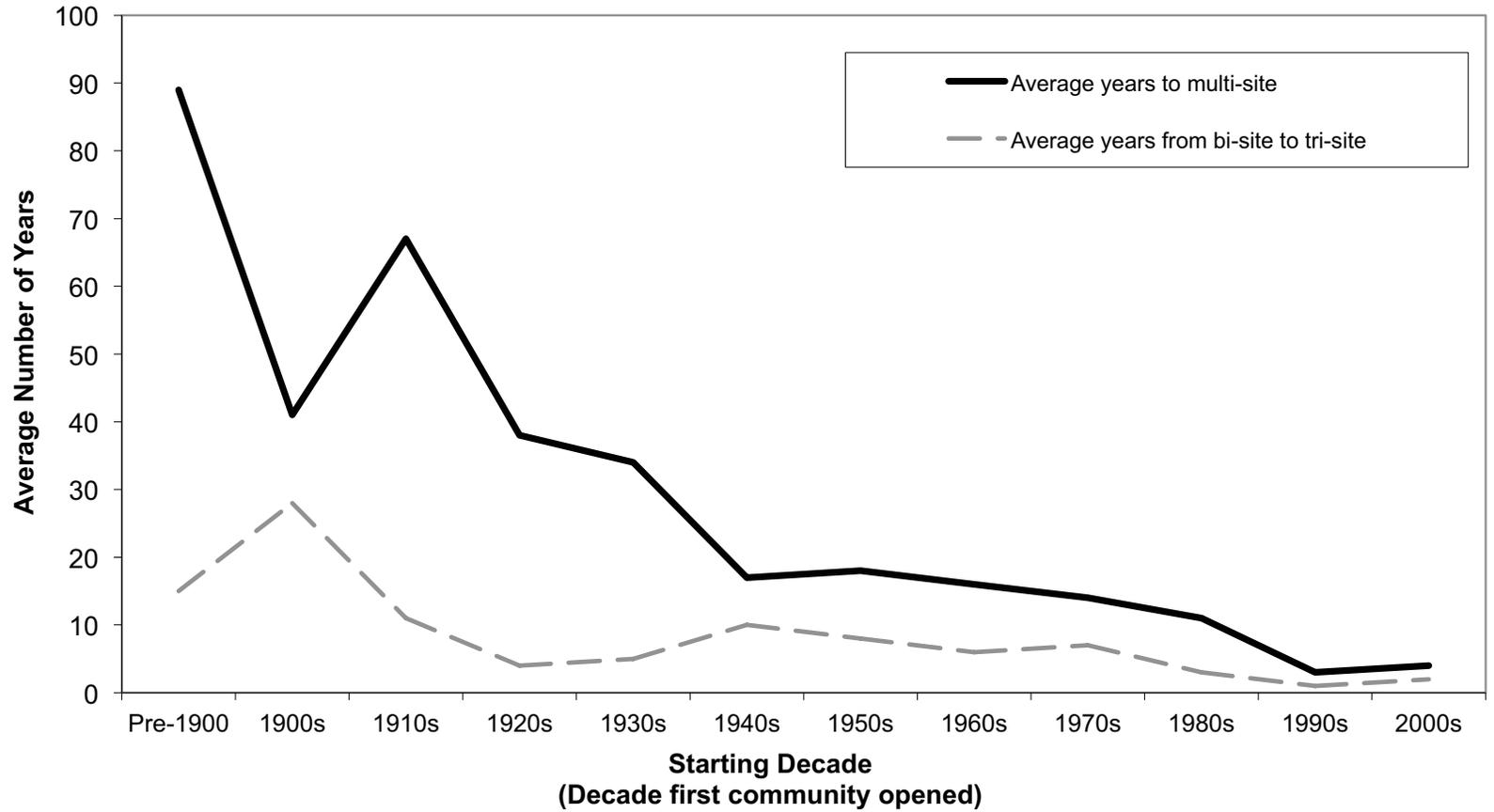
5-5d YEARS BETWEEN NEW COMMUNITIES, BY NUMBER OF SYSTEMS



5-5 2013 LeadingAge Ziegler 100

Growth: Emerging Systems

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



5-6 2013 LeadingAge Ziegler 100

Growth: Rapid Changers

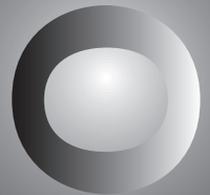
5-6a ORGANIZATIONS BY AGGREGATE GROWTH, BY PERIOD

| 2013 Rank | System Name | State | Growth* | | Units Added | Total Units (as of 12/31/12) |
|---|---|-------|----------------------|---------------------------|-------------|---------------------------------|
| | | | Aggregate Growth (%) | Average Annual Growth (%) | | |
| Growth in 2012 (n=100) | | | | | | |
| 97 | Givens Estates Retirement Community | NC | 58.00% | 58.00% | 301 | 820 |
| 32 | The Eddy | NY | 35.69% | 35.69% | 440 | 1,673 |
| 67 | Presbyterian SeniorCare | PA | 27.39% | 27.39% | 229 | 1,065 |
| 56 | Friendship Senior Options | IL | 23.16% | 23.16% | 233 | 1,239 |
| 69 | Presbyterian Villages of Michigan | MI | 15.86% | 15.86% | 144 | 1,052 |
| 65 | Los Angeles Jewish Home for the Aged | CA | 10.98% | 10.98% | 108 | 1,092 |
| 24 | Willow Valley Retirement Communities | PA | 9.91% | 9.91% | 180 | 1,997 |
| 8 | The Kendal Corporation | PA | 8.21% | 8.21% | 257 | 3,389 |
| 12 | Ohio Presbyterian Retirement Services | OH | 8.16% | 8.16% | 229 | 3,034 |
| 4 | Presbyterian Homes and Services | MN | 5.62% | 5.62% | 350 | 6,582 |
| Growth from 2000 to 2012 (n=100) | | | | | | |
| 34 | Homewood Retirement Centers | MD | n/a** | n/a** | 1,631 | 1,631 |
| 38 | Senior Quality Lifestyles Corporation | TX | n/a** | n/a** | 1,587 | 1,587 |
| 65 | Los Angeles Jewish Home for the Aged | CA | n/a** | n/a** | 1,092 | 1,092 |
| 2 | National Senior Campuses | MD | 560.21% | 17.03% | 14,700 | 17,324 |
| 36 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 323.54% | 12.78% | 1,223 | 1,601 |
| 18 | Ecumen | MN | 284.44% | 11.88% | 1,883 | 2,545 |
| 31 | National Church Residences | OH | 283.45% | 11.85% | 1,250 | 1,691 |
| 77 | SantaFe Senior Living | FL | 230.85% | 10.48% | 681 | 976 |
| 10 | Lutheran Senior Services | MO | 209.15% | 9.86% | 2,217 | 3,277 |
| 29 | Christian Care Companies | AZ | 197.17% | 9.50% | 1,185 | 1,786 |
| Growth from 1990 to 2012 (n=100) | | | | | | |
| 2 | National Senior Campuses | MD | n/a** | n/a** | 17,324 | 17,324 |
| 34 | Homewood Retirement Centers | MD | n/a** | n/a** | 1,631 | 1,631 |
| 38 | Senior Quality Lifestyles Corporation | TX | n/a** | n/a** | 1,587 | 1,587 |
| 55 | Bethesda Senior Living Communities | CO | n/a** | n/a** | 1,250 | 1,250 |
| 65 | Los Angeles Jewish Home for the Aged | CA | n/a** | n/a** | 1,092 | 1,092 |
| 36 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 830.81% | 10.67% | 1,429 | 1,601 |
| 97 | Givens Estates Retirement Community | NC | 791.30% | 10.45% | 728 | 820 |
| 75 | Elant | NY | 729.17% | 10.09% | 875 | 995 |
| 4 | Presbyterian Homes and Services | MN | 707.61% | 9.96% | 5,767 | 6,582 |
| 70 | Lutheran Homes of South Carolina | SC | 674.63% | 9.75% | 904 | 1,038 |

* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2012 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,573/(17,197-14,573). Average Annual Growth was calculated by finding the geometric mean over the period (1, 12, or 22 years).

** The system was founded after the beginning of the time period so they had zero units at the start of the period. Aggregate and Annual Growth rates can not be calculated in this case.

§ At the beginning of the base year of the period, these organizations were single-site organizations.



5-6 2013 LeadingAge Ziegler 100

Growth: Rapid Changers

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

| 2013 Rank | System Name | State | Growth* | | Total Units (as of 12/31/12) |
|---|---|-------|-------------|----------------------|---------------------------------|
| | | | Units Added | Aggregate Growth (%) | |
| Growth in 2012 (n=100) | | | | | |
| 32 | The Eddy | NY | 440 | 35.69% | 1,673 |
| 4 | Presbyterian Homes and Services | MN | 350 | 5.62% | 6,582 |
| 97 | Givens Estates Retirement Community | NC | 301 | 58.00% | 820 |
| 8 | The Kendal Corporation | PA | 257 | 8.21% | 3,389 |
| 56 | Friendship Senior Options | IL | 233 | 23.16% | 1,239 |
| 12 | Ohio Presbyterian Retirement Services | OH | 229 | 8.16% | 3,034 |
| 67 | Presbyterian SeniorCare | PA | 229 | 27.39% | 1,065 |
| 24 | Willow Valley Retirement Communities | PA | 180 | 9.91% | 1,997 |
| 69 | Presbyterian Villages of Michigan | MI | 144 | 15.86% | 1,052 |
| 65 | Los Angeles Jewish Home for the Aged | CA | 108 | 10.98% | 1,092 |
| Growth from 2000 to 2012 (n=100) | | | | | |
| 2 | National Senior Campuses | MD | 14,700 | 560.21% | 17,324 |
| 1 | Evangelical Lutheran Good Samaritan Society | SD | 7,655 | 70.83% | 18,462 |
| 4 | Presbyterian Homes and Services | MN | 3,901 | 145.51% | 6,582 |
| 3 | ACTS Retirement-Life Communities, Inc. | PA | 2,320 | 40.35% | 8,069 |
| 10 | Lutheran Senior Services | MO | 2,217 | 209.15% | 3,277 |
| 18 | Ecumen | MN | 1,883 | 284.44% | 2,545 |
| 8 | The Kendal Corporation | PA | 1,646 | 94.43% | 3,389 |
| 34 | Homewood Retirement Centers | MD | 1,631 | n/a** | 1,631 |
| 38 | Senior Quality Lifestyles Corporation | TX | 1,587 | n/a** | 1,587 |
| 14 | Pacific Retirement Services, Inc. | OR | 1,527 | 117.73% | 2,824 |
| Growth from 1990 to 2012 (n=100) | | | | | |
| 2 | National Senior Campuses | MD | 17,324 | n/a** | 17,324 |
| 1 | Evangelical Lutheran Good Samaritan Society | SD | 8,677 | 88.68% | 18,462 |
| 4 | Presbyterian Homes and Services | MN | 5,767 | 707.61% | 6,582 |
| 3 | ACTS Retirement-Life Communities, Inc. | PA | 3,138 | 63.64% | 8,069 |
| 8 | The Kendal Corporation | PA | 2,636 | 350.07% | 3,389 |
| 10 | Lutheran Senior Services | MO | 2,586 | 374.24% | 3,277 |
| 14 | Pacific Retirement Services, Inc. | OR | 2,367 | 517.94% | 2,824 |
| 9 | Westminster Communities of Florida | FL | 2,115 | 178.63% | 3,299 |
| 15 | Asbury Communities | MD | 1,900 | 217.14% | 2,775 |
| 18 | Ecumen | MN | 1,883 | 284.44% | 2,545 |

* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2012 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,573/(17,197-14,573). Average Annual Growth was calculated by finding the geometric mean over the period (1, 12, or 22 years).

** The system was founded after the beginning of the time period so they had zero units at the start of the period. Aggregate and Annual Growth rates can not be calculated in this case.

5-6 2013 LeadingAge Ziegler 100

Growth: Rapid Changers

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

| 2013 Rank | System Name | State | Growth* | | Units Added | Total Units (as of 12/31/12) |
|---|---|-------|----------------------|---------------------------|-------------|---------------------------------|
| | | | Aggregate Growth (%) | Average Annual Growth (%) | | |
| Growth in 2012 (n=100) | | | | | | |
| 8 | The Kendal Corporation | PA | 8.21% | 8.21% | 257 | 3,389 |
| 12 | Ohio Presbyterian Retirement Services | OH | 8.16% | 8.16% | 229 | 3,034 |
| 4 | Presbyterian Homes and Services | MN | 5.62% | 5.62% | 350 | 6,582 |
| Growth from 2000 to 2012 (n=100) | | | | | | |
| 2 | National Senior Campuses | MD | 560.21% | 17.03% | 14,700 | 17,324 |
| 18 | Ecumen | MN | 284.44% | 11.88% | 1,883 | 2,545 |
| 10 | Lutheran Senior Services | MO | 209.15% | 9.86% | 2,217 | 3,277 |
| 4 | Presbyterian Homes and Services | MN | 145.51% | 7.77% | 3,901 | 6,582 |
| 14 | Pacific Retirement Services, Inc. | OR | 117.73% | 6.70% | 1,527 | 2,824 |
| 8 | The Kendal Corporation | PA | 94.43% | 5.70% | 1,646 | 3,389 |
| 1 | Evangelical Lutheran Good Samaritan Society | SD | 70.83% | 4.56% | 7,655 | 18,462 |
| 15 | Asbury Communities | MD | 69.41% | 4.49% | 1,137 | 2,775 |
| 22 | Masonic Villages | PA | 67.15% | 4.37% | 934 | 2,325 |
| 9 | Westminster Communities of Florida | FL | 55.10% | 3.73% | 1,172 | 3,299 |
| Growth from 1990 to 2012 (n=100) | | | | | | |
| 2 | National Senior Campuses | MD | n/a** | n/a** | 17,324 | 17,324 |
| 4 | Presbyterian Homes and Services | MN | 707.61% | 9.96% | 5,767 | 6,582 |
| 14 | Pacific Retirement Services, Inc. | OR | 517.94% | 8.63% | 2,367 | 2,824 |
| 10 | Lutheran Senior Services | MO | 374.24% | 7.33% | 2,586 | 3,277 |
| 8 | The Kendal Corporation | PA | 350.07% | 7.08% | 2,636 | 3,389 |
| 18 | Ecumen | MN | 284.44% | 6.31% | 1,883 | 2,545 |
| 15 | Asbury Communities | MD | 217.14% | 5.39% | 1,900 | 2,775 |
| 9 | Westminster Communities of Florida | FL | 178.63% | 4.77% | 2,115 | 3,299 |
| 11 | Presbyterian Senior Living | PA | 125.57% | 3.77% | 1,768 | 3,176 |
| 12 | Ohio Presbyterian Retirement Services | OH | 115.79% | 3.56% | 1,628 | 3,034 |

* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2012 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,621/(17,245-14,621). Average Annual Growth was calculated by finding the geometric mean over the period (1, 11, or 21 years).

** The system was founded after the beginning of the time period so they had zero units at the start of the period. Aggregate and Annual Growth rates can not be calculated in this case.

§ At the beginning of the base year of the period, these organizations were single-site organizations.

5-6 2013 LeadingAge Ziegler 100

Growth: Rapid Changers

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

| 2013 Rank | System Name | State | Growth* | | Units Removed | Total Units (as of 12/31/12) |
|---|--|-------|----------------------|---------------------------|---------------|---------------------------------|
| | | | Aggregate Growth (%) | Average Annual Growth (%) | | |
| Change in 2012 (n=100) | | | | | | |
| 77 | SantaFe Senior Living | FL | -23.51% | -23.51% | -300 | 1276 |
| 74 | Air Force Villages | TX | -10.12% | -10.12% | -114 | 1,127 |
| 91 | St. Ann's Community | NY | -5.37% | -5.37% | -49 | 912 |
| 35 | Springpoint Senior Living | NJ | -5.32% | -5.32% | -90 | 1,691 |
| 64 | Sears Methodist Retirement System, Inc. | TX | -3.35% | -3.35% | -38 | 1,135 |
| 18 | Ecumen | MN | -3.01% | -3.01% | -79 | 2,624 |
| 76 | United Church Homes | OH | -1.51% | -1.51% | -15 | 992 |
| 14 | Pacific Retirement Services, Inc. | OR | -1.26% | -1.26% | -36 | 2,860 |
| 3 | ACTS Retirement-Life Communities, Inc. | PA | -0.75% | -0.75% | -61 | 8,130 |
| 73 | Wesley Enhanced Living | PA | -0.29% | -0.29% | -3 | 1,019 |
| Change from 2000 to 2012 (n=100) | | | | | | |
| 60 | American Baptist Homes of the Midwest | MN | -40.18% | -4.19% | -806 | 1,200 |
| 21 | Diakon Lutheran Social Ministries | PA | -33.12% | -3.30% | -1,213 | 2,449 |
| 71 | Walker Methodist | MN | -26.51% | -2.53% | -373 | 1,034 |
| 94 | Presbyterian Communities of South Carolina | SC | -9.50% | -0.83% | -89 | 848 |
| 76 | United Church Homes | OH | -8.86% | -0.77% | -95 | 977 |
| 49 | Mississippi Methodist Senior Services | MS | -7.40% | -0.64% | -111 | 1,390 |
| 95 | LutherCare | PA | -5.19% | -0.44% | -46 | 840 |
| 17 | Front Porch | CA | -4.17% | -0.35% | -111 | 2,551 |
| 90 | Presbyterian Communities and Services | TX | -1.93% | -0.16% | -17 | 864 |
| 79 | Presby's Inspired Life | PA | -1.76% | -0.15% | -17 | 947 |
| Change from 1990 to 2012 (n=100) | | | | | | |
| 21 | Diakon Lutheran Social Ministries | PA | -20.54% | -1.04% | -633 | 2,449 |
| 90 | Presbyterian Communities and Services | TX | -1.93% | -0.09% | -17 | 864 |
| 94 | Presbyterian Communities of South Carolina | SC | -0.24% | -0.01% | -2 | 848 |

* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2012 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,621/(17,245-14,621). Average Annual Growth was calculated by finding the geometric mean over the period (1, 11, or 21 years).

5-7 2013 LeadingAge Ziegler 100

Growth: Profiles of Rapid Changers

Greatest Increase in Units

#32 The Eddy

Year Founded: 1928 Classification: Metropolitan
CEO: Jo Ann Costantino CFO: Richard Petterson

UPDATE FOR THE EDDY: The Eddy began in 1928 as a 19-bed nursing home in Troy, New York, established by Elizabeth Hart Shields Eddy with funds bequested by her husband, James A. Eddy. Since then, The Eddy has built on a tradition of safety, care, comfort and innovation to become a nationally recognized leader in compassionate, high quality senior services. Today, The Eddy is a comprehensive continuum of healthcare, supportive housing and community services that reaches 22 counties and serves more than 50,000 people yearly.

Among the LZ 100 organizations, The Eddy had the largest increase in units in 2012. Planned expansions of Independent Living areas led to an increase of Independent Living Units as well as a change in sponsoring health systems. In 2012, Northeast Health (the health system The Eddy was affiliated with) merged with St. Peter's Health Care Services and Seton Health to form St. Peter's Health Partners (SPHP). As a result, The Eddy became the Continuing Care Division of SPHP and took oversight of the senior living services for SPHP. This oversight of SPHP includes three area nursing homes: Schuyler Ridge in Clifton Park, New York, St. Peter's Nursing and Rehabilitation Center in Albany, New York, and Our Lady of Mercy Center in Guilderland, New York. This increased oversight has led to an additional 440 healthcare units. The Eddy is now comprised of 502 ILUs, 313 ALUs and 858 NCBs.

System size as of 12/31/12

| | | |
|-----|--------------|--------------|
| ILU | 502 | |
| ALU | 313 | |
| NCB | <u>858</u> | |
| | 1,673 | Total |

5-7 2013 LeadingAge Ziegler 100

Growth: Profiles of Rapid Changers

System Emergence

#97 Givens Estates Retirement Community

Year Founded: 1975 Classification: Single State

CEO: Ken Partin CFO: Allen Squires

In 2010, Givens Estates completed a strategic planning process and the Board of Directors adopted a new strategic plan that included expanding to other locations through the acquisition of an existing CCRC or construction of a new community. Givens began considering many possibilities while remaining open to opportunities that might become available. The owners of Highland Farms, an existing CCRC in North Carolina with a 40-year track record of successful operations, were of retirement age and beginning to consider a succession plan for their community. In November 2011, they developed a short list of potential new owners and began making contact to determine interest. Givens was poised to move quickly. Senior management developed a team of consultants to work with them in determining the level of interest. In April 2012, the Givens Board and the owners of Highland Farms came to an agreement and, in December 2012, the transaction closed and ownership transferred to Givens.

Givens Estates is a CCRC with 385 independent living units, 61 assisted living units and 70 nursing care beds. Givens Highland Farms is a CCRC with 214 independent living units, 30 assisted living units and 60 nursing care beds. Givens Estates and Givens Highland Farms have good reputations of providing quality care in the region, state and beyond. Both communities are distinctly different and complement each other. Givens is committed to serving older adults of all income levels. In particular, the Highland Farms acquisition enhances its ability to expand in the middle income market. Givens experienced significant growth and became a multi-site community during 2012. These changes are among the most significant in its history.

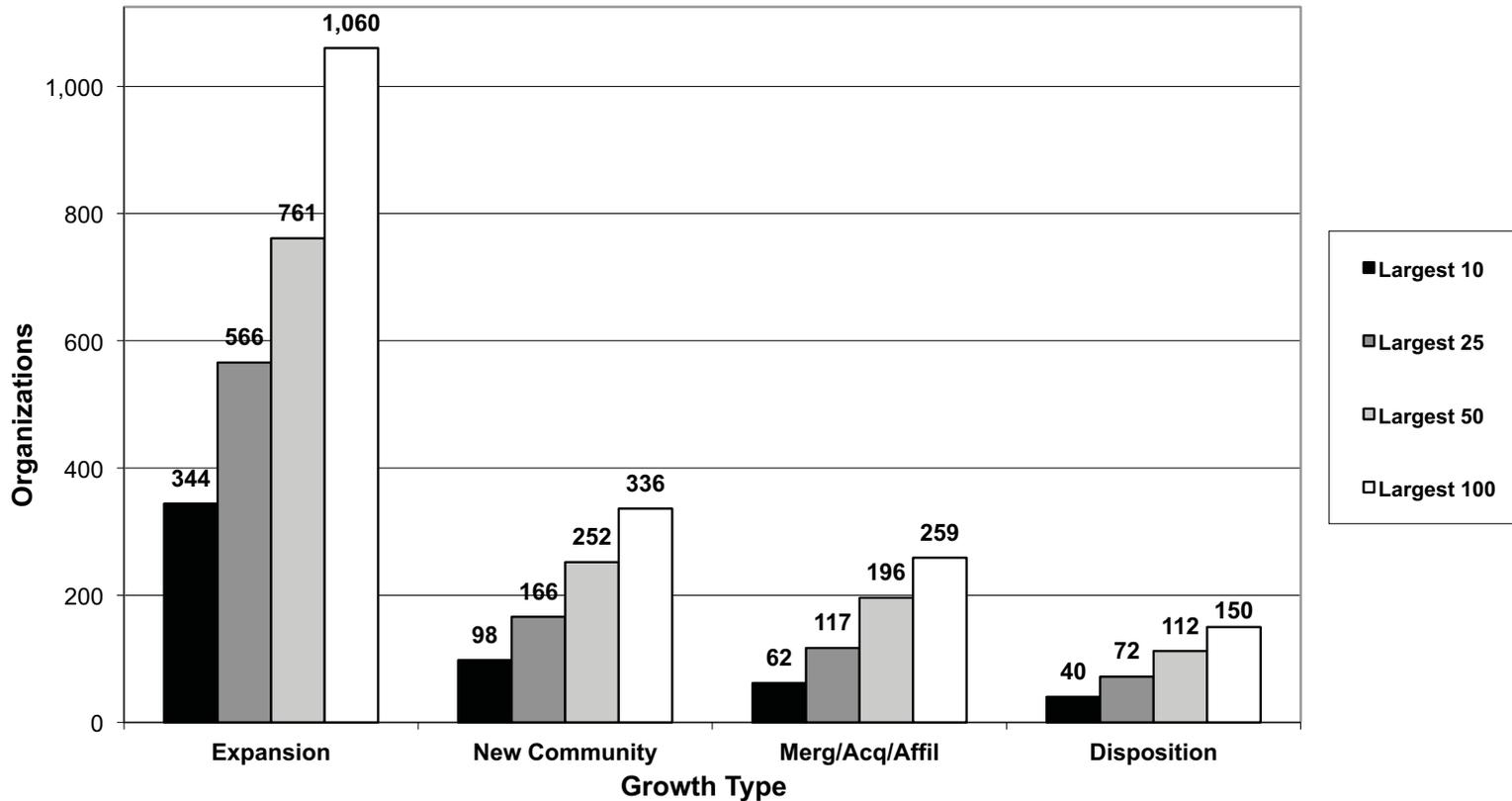
System size as of 12/31/12

| | | |
|-----|------------|--------------|
| ILU | 599 | |
| ALU | 91 | |
| NCB | <u>130</u> | |
| | 820 | Total |

5-8 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Organizations

5-8a NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1980 THROUGH 2012



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

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

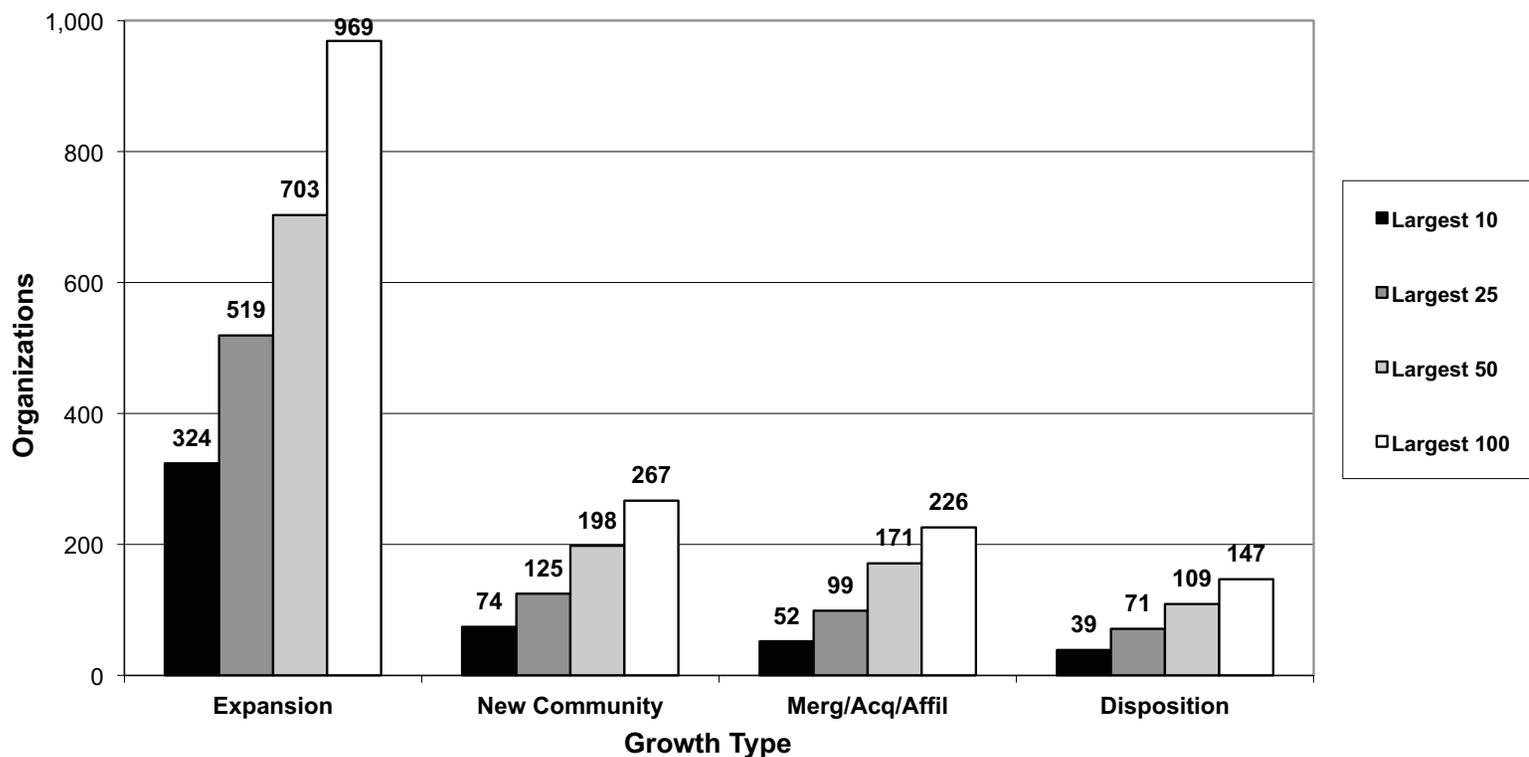
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-8 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Organizations

5-8b NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1990 THROUGH 2012



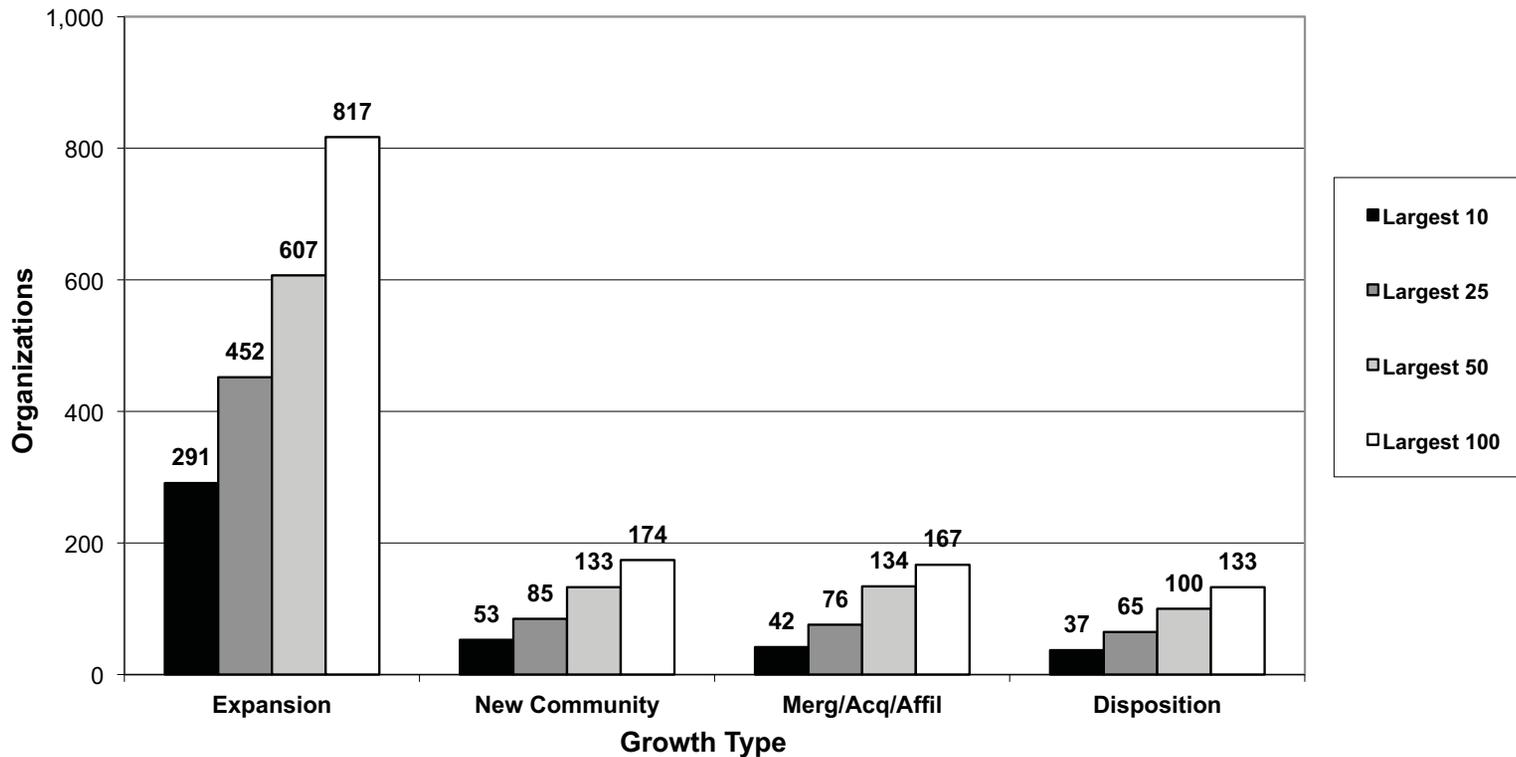
Expansion: The addition of new units to an existing community.
 Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

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

5-8 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Organizations

5-8c NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 2000 THROUGH 2012



Expansion: The addition of new units to an existing community.

Note: If a new community is added to an existing campus this is also considered an expansion.

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

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

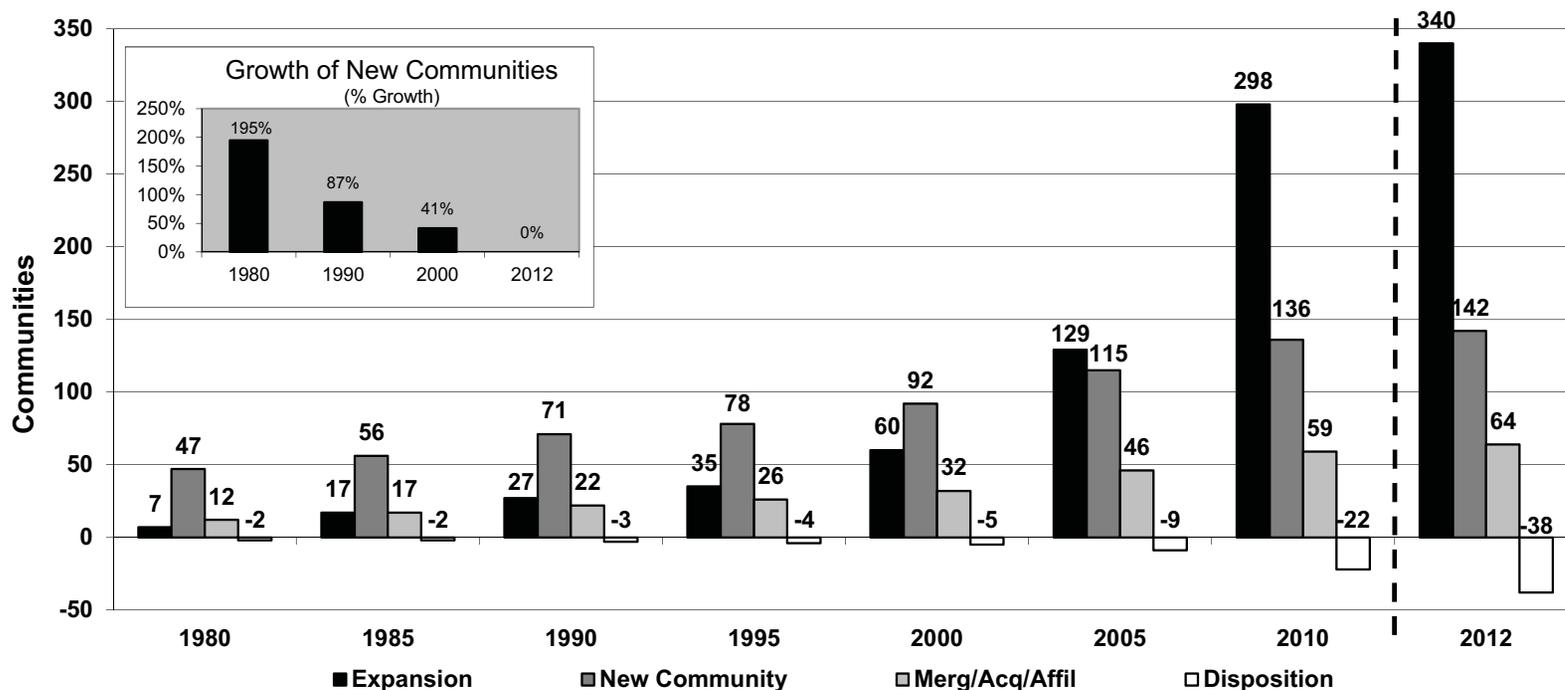
Disposition: The sale or closure of a community.

5-9 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

5-9a CUMULATIVE GROWTH OF LARGEST 10 SYSTEMS

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



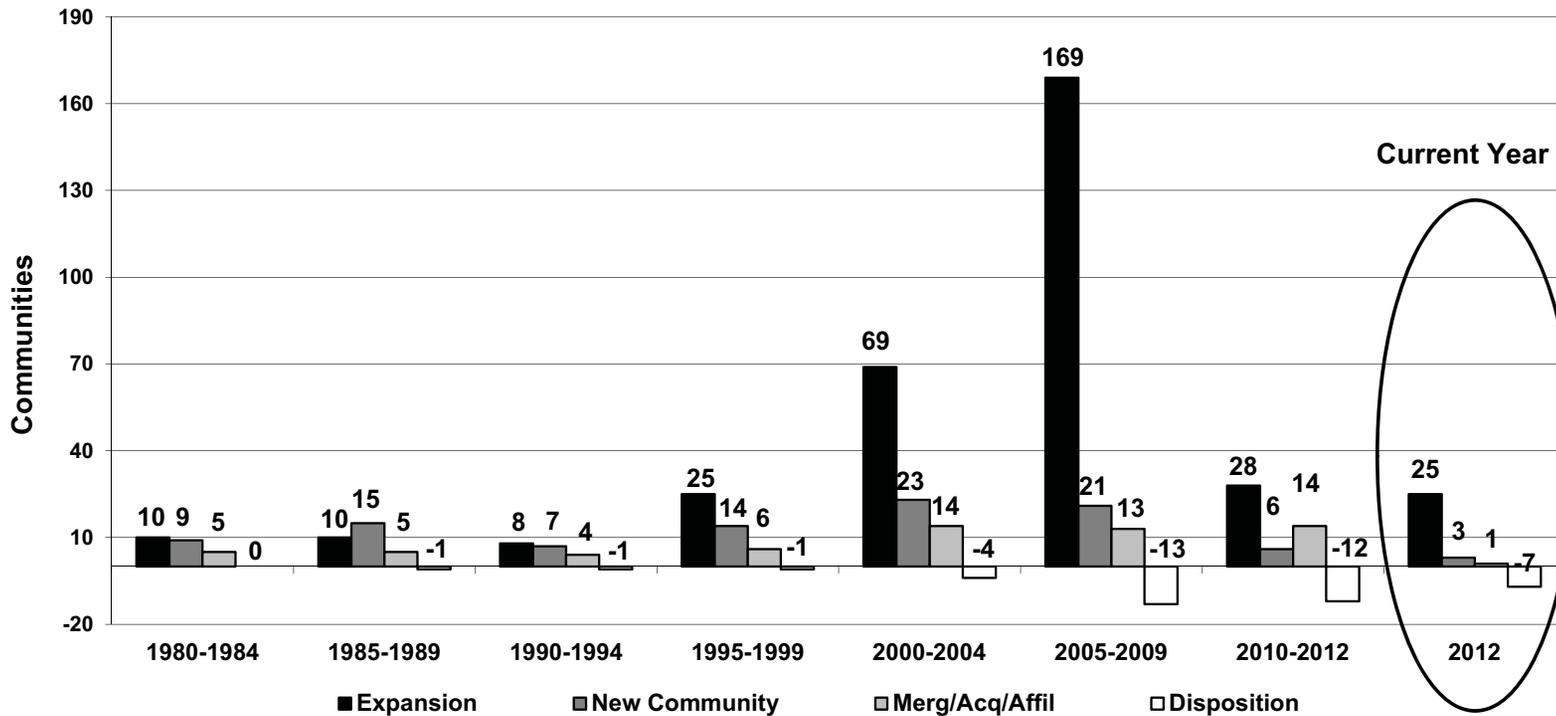
Expansion: The addition of new units to an existing community.
 Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

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

5-9 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

5-9b INCREMENTAL GROWTH OF LARGEST 10 SYSTEMS



Expansion: The addition of new units to an existing community.

Note: If a new community is added to an existing campus this is also considered an expansion.

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

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

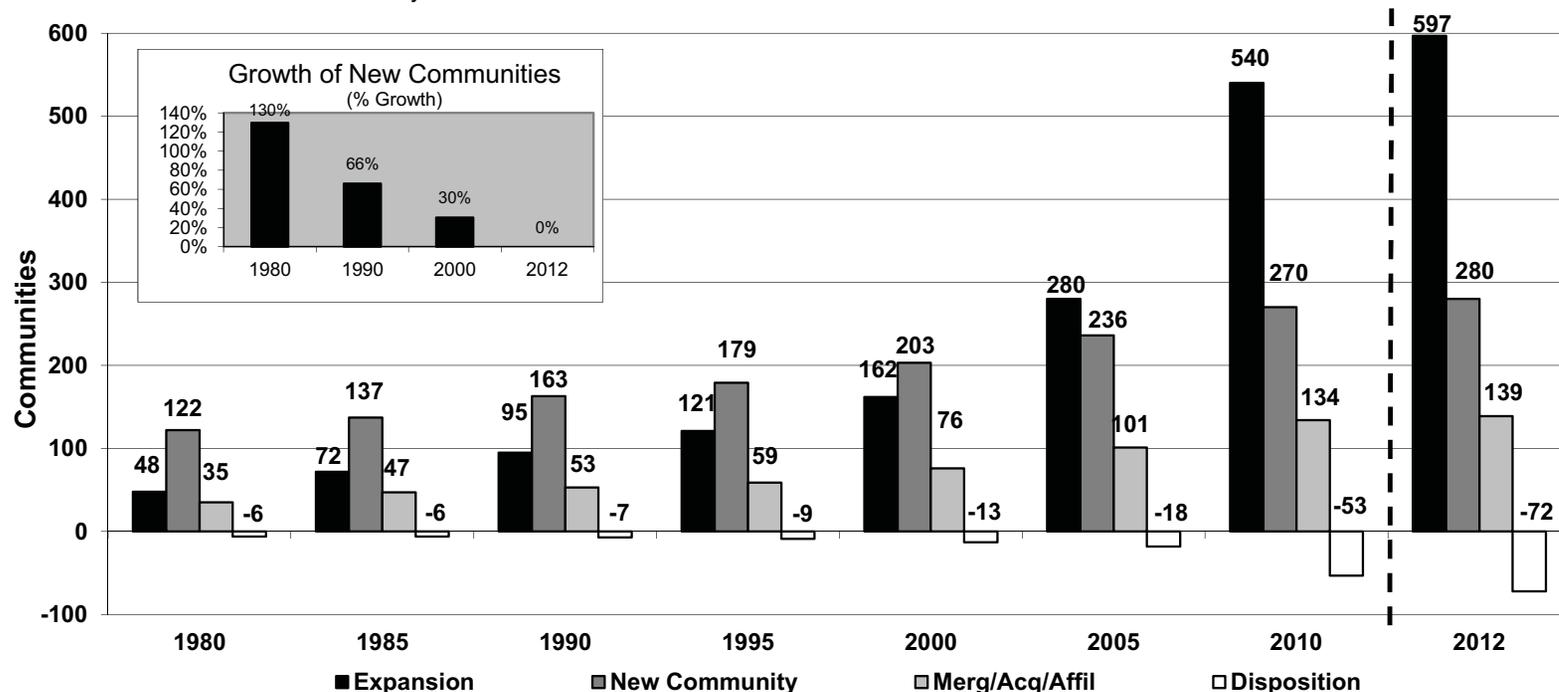
Disposition: The sale or closure of a community.

5-9 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

5-9c CUMULATIVE GROWTH OF LARGEST 25 SYSTEMS

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



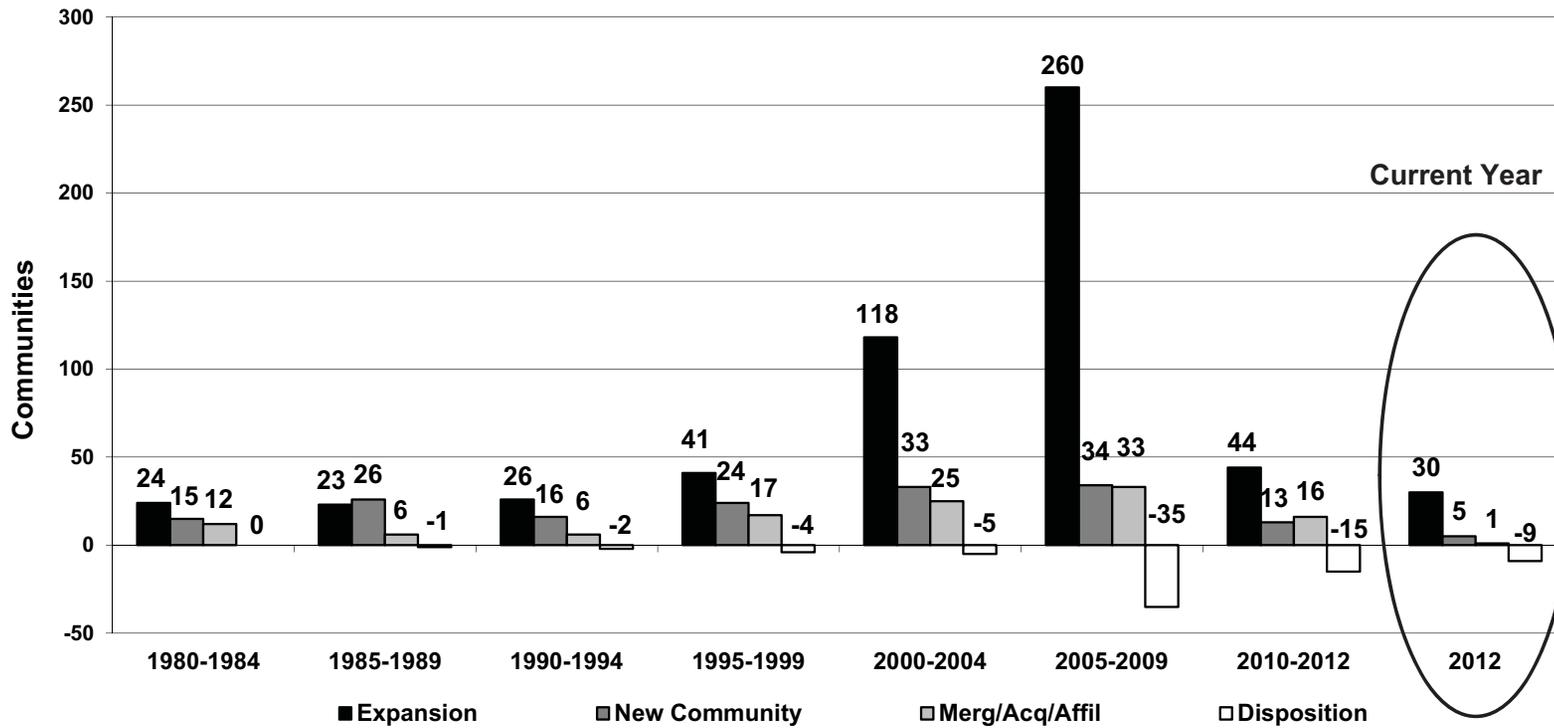
Expansion: The addition of new units to an existing community.
 Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

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

5-9 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

5-9d INCREMENTAL GROWTH OF LARGEST 25 SYSTEMS



Expansion: The addition of new units to an existing community.

Note: If a new community is added to an existing campus this is also considered an expansion.

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

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

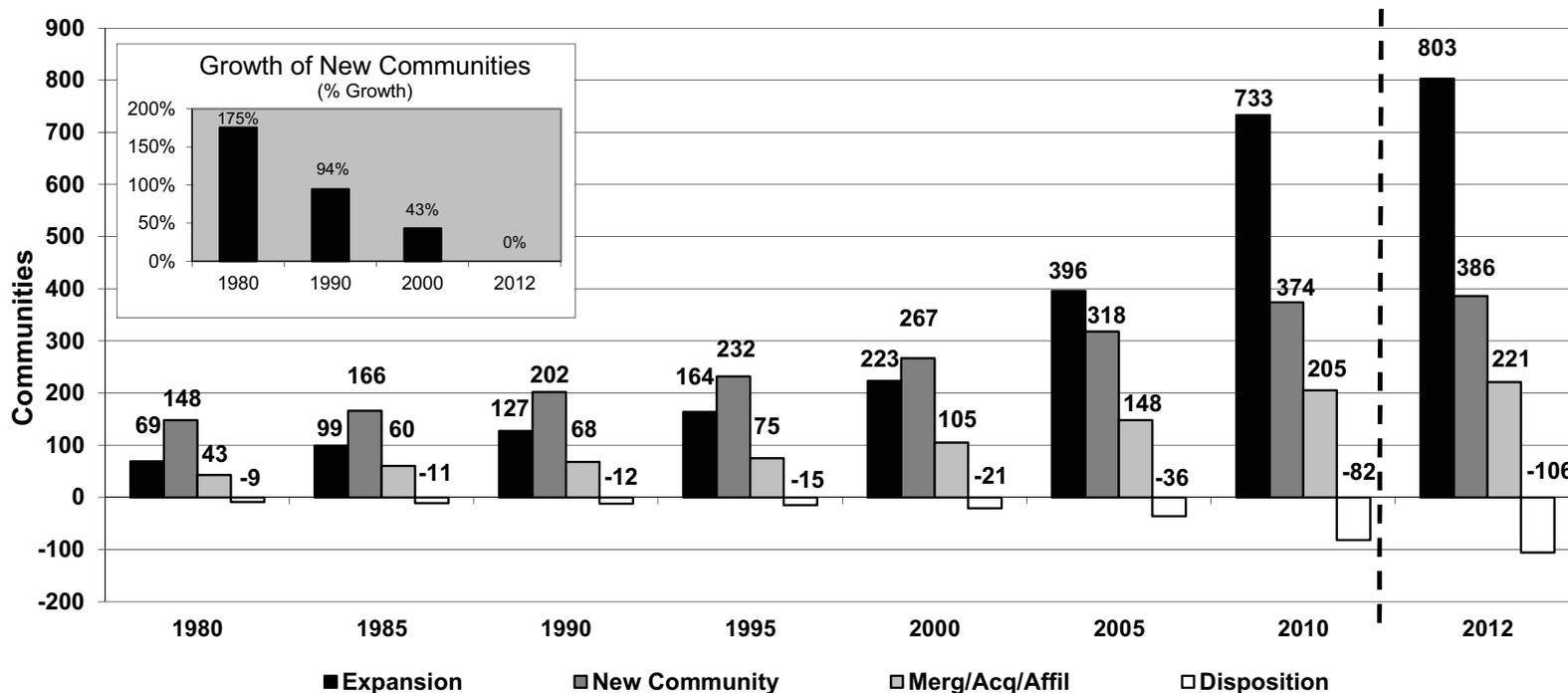
Disposition: The sale or closure of a community.

5-9 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

5-9e CUMULATIVE GROWTH OF LARGEST 50 SYSTEMS

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



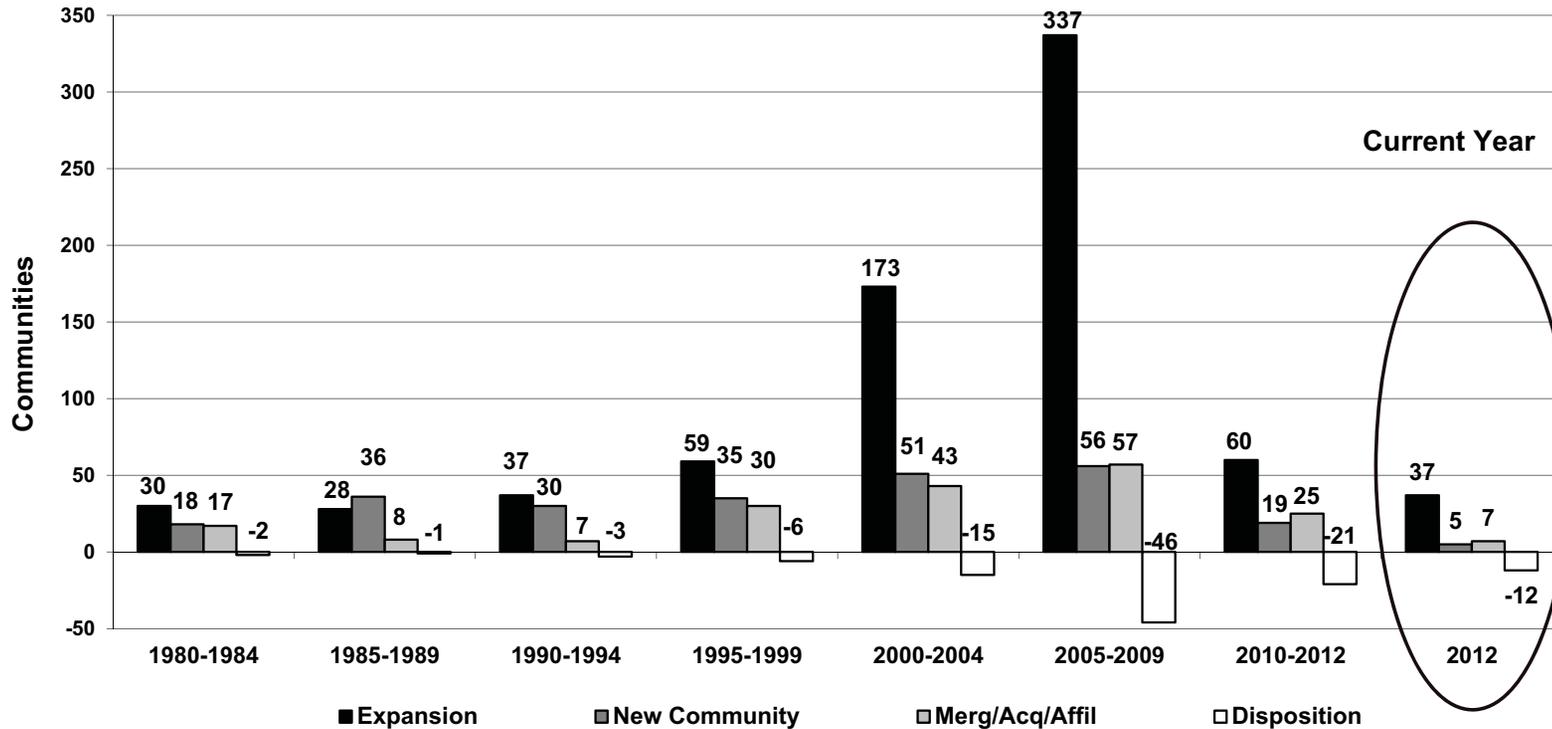
Expansion: The addition of new units to an existing community.
 Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

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

5-9 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

5-9f INCREMENTAL GROWTH OF LARGEST 50 SYSTEMS



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

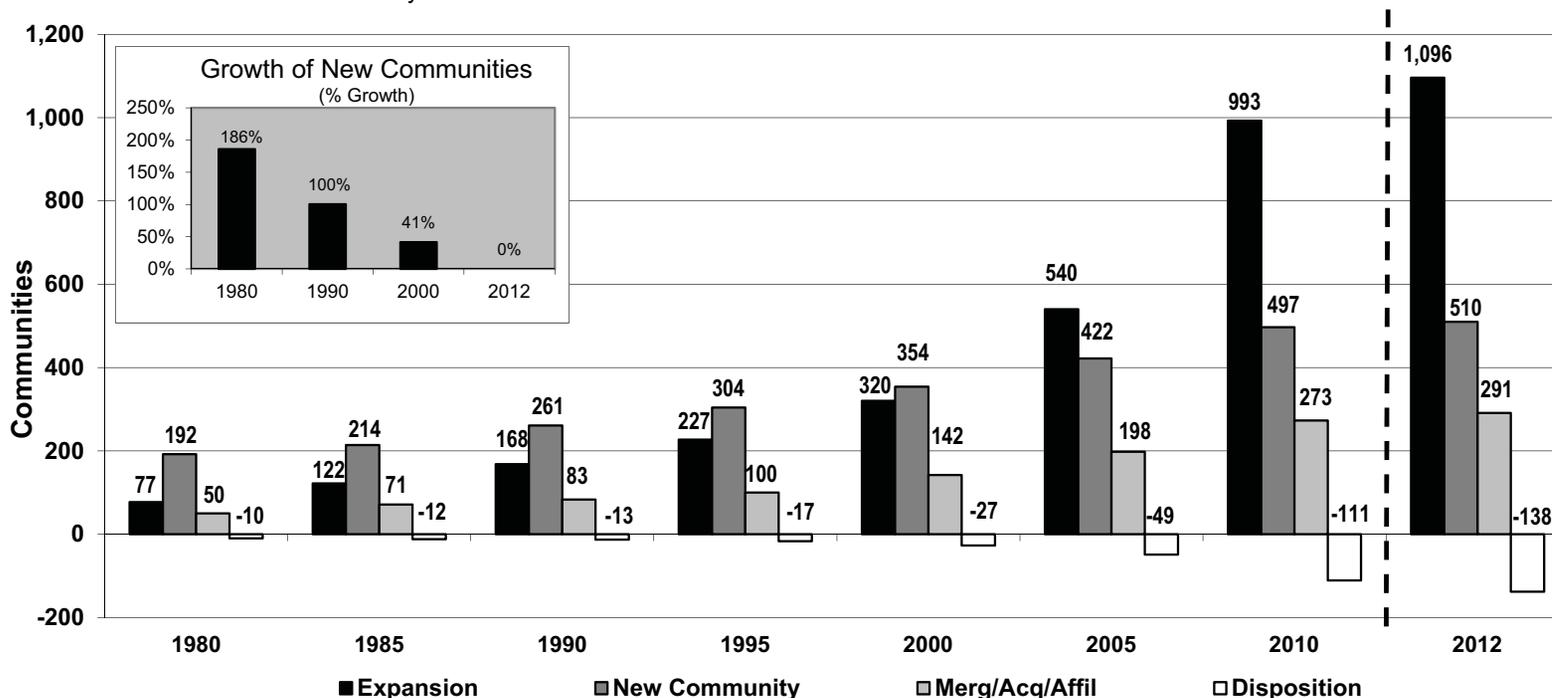
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

5-9 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

5-9g CUMULATIVE GROWTH OF LZ 100

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



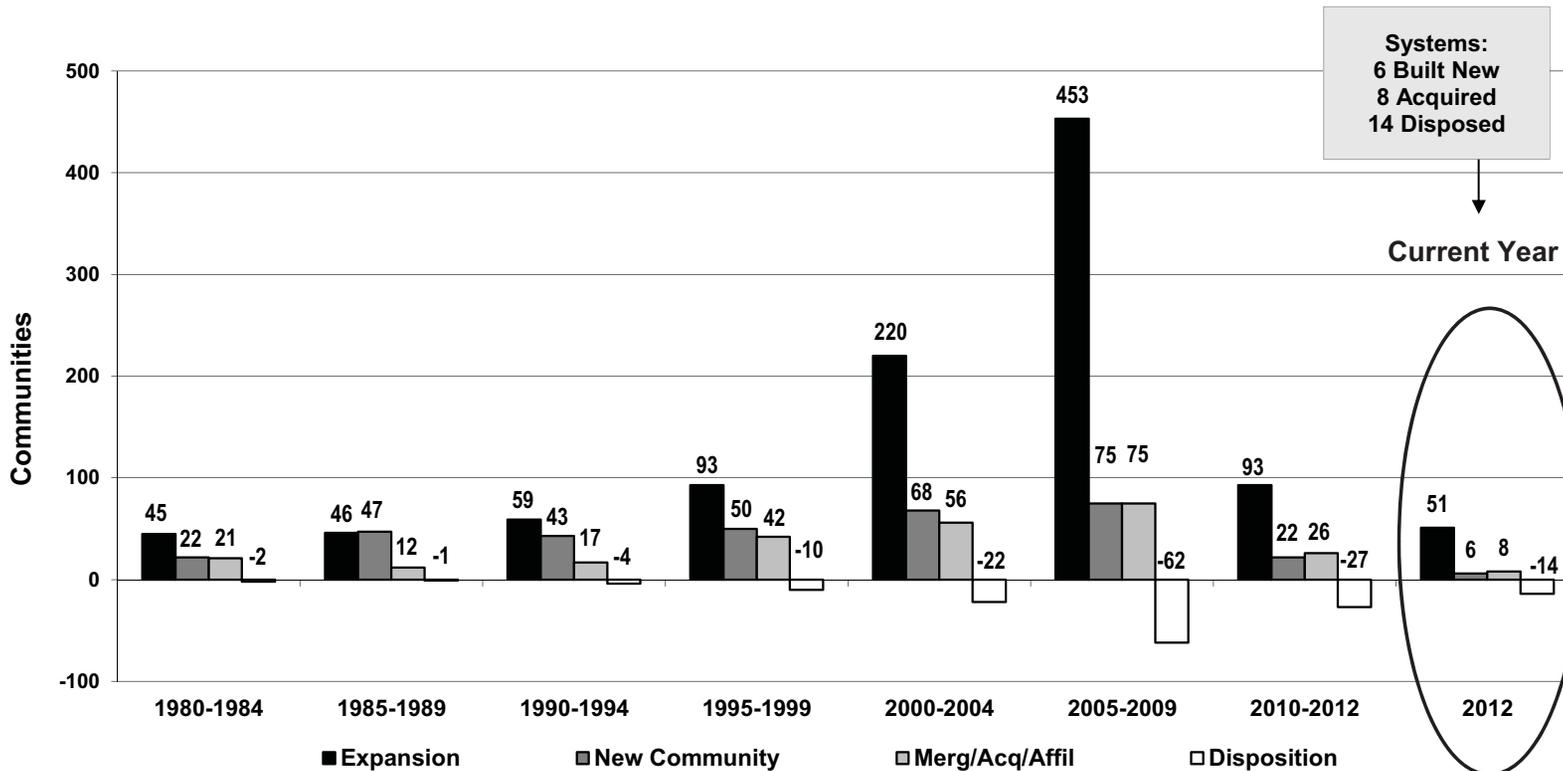
Expansion: The addition of new units to an existing community.
 Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

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

5-9 2013 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

5-9h INCREMENTAL GROWTH OF LZ 100



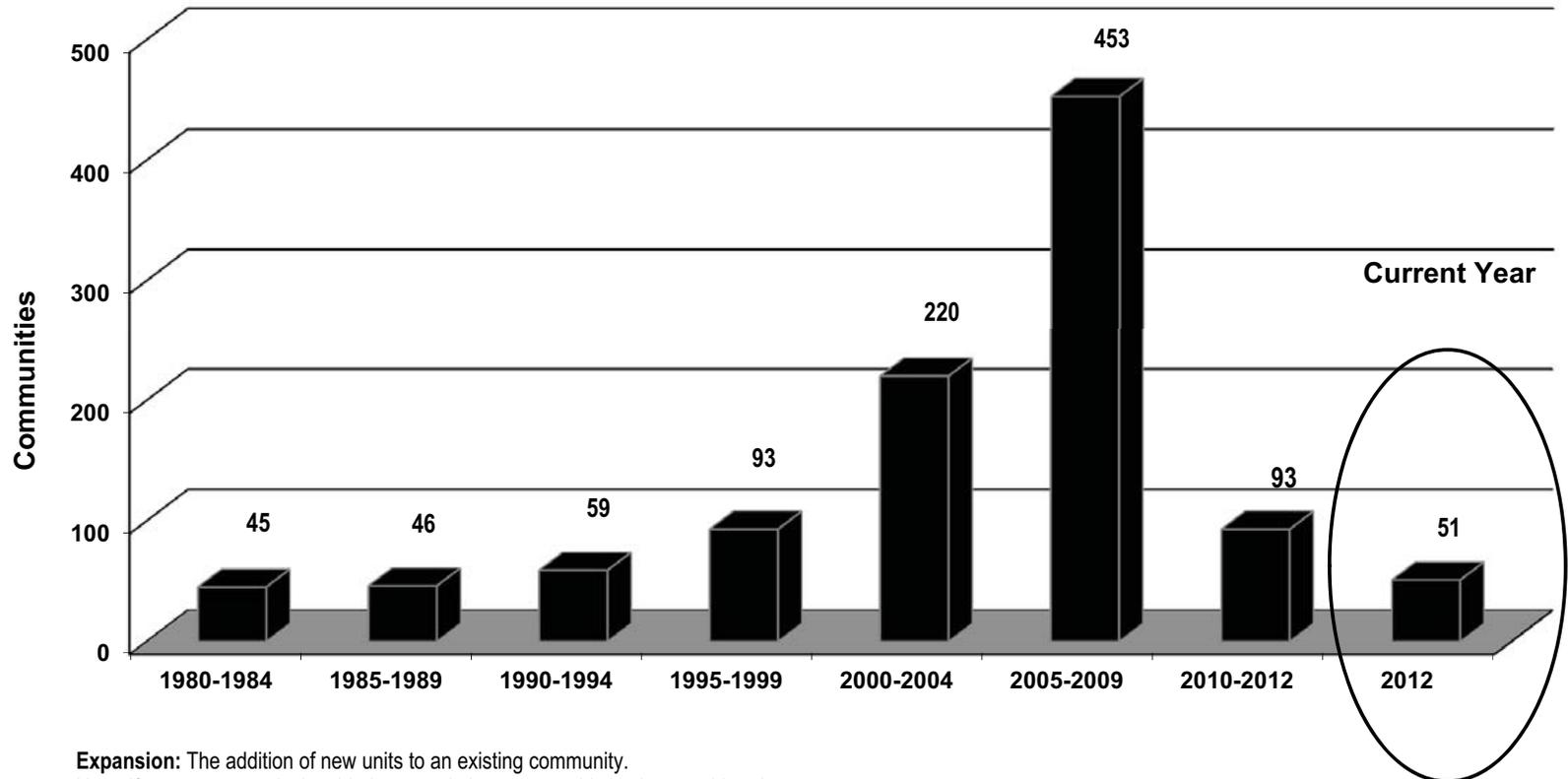
Expansion: The addition of new units to an existing community.
 Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

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

5-10 2013 LeadingAge Ziegler 100

Growth: Expansions

5-10 HISTORICAL GROWTH



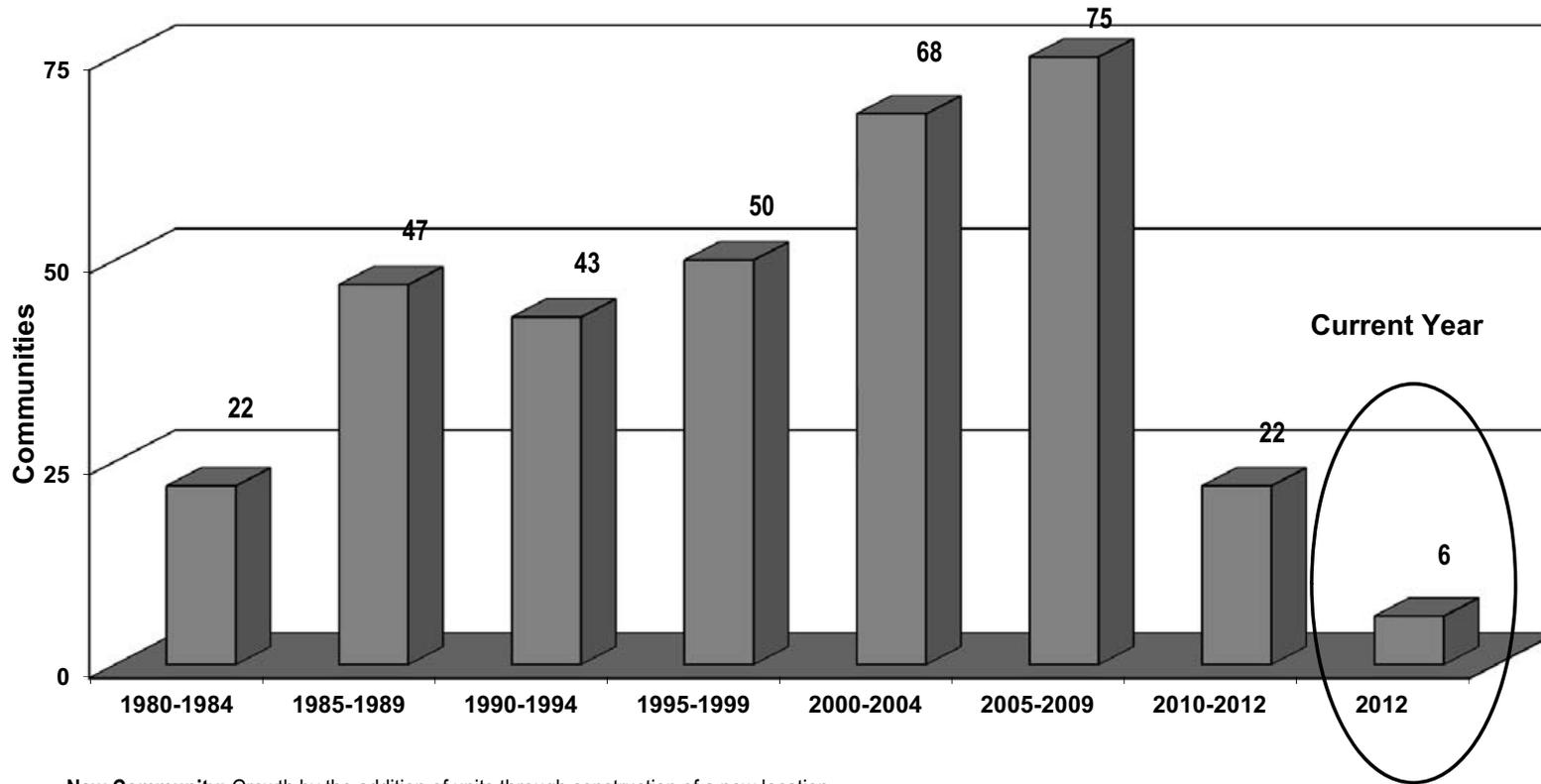
Expansion: The addition of new units to an existing community.

Note: If a new community is added to an existing campus this is also considered an expansion.

5-11 2013 LeadingAge Ziegler 100

Growth: New Communities

5-11a HISTORICAL GROWTH



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

5-11 2013 LeadingAge Ziegler 100

Growth: New Communities

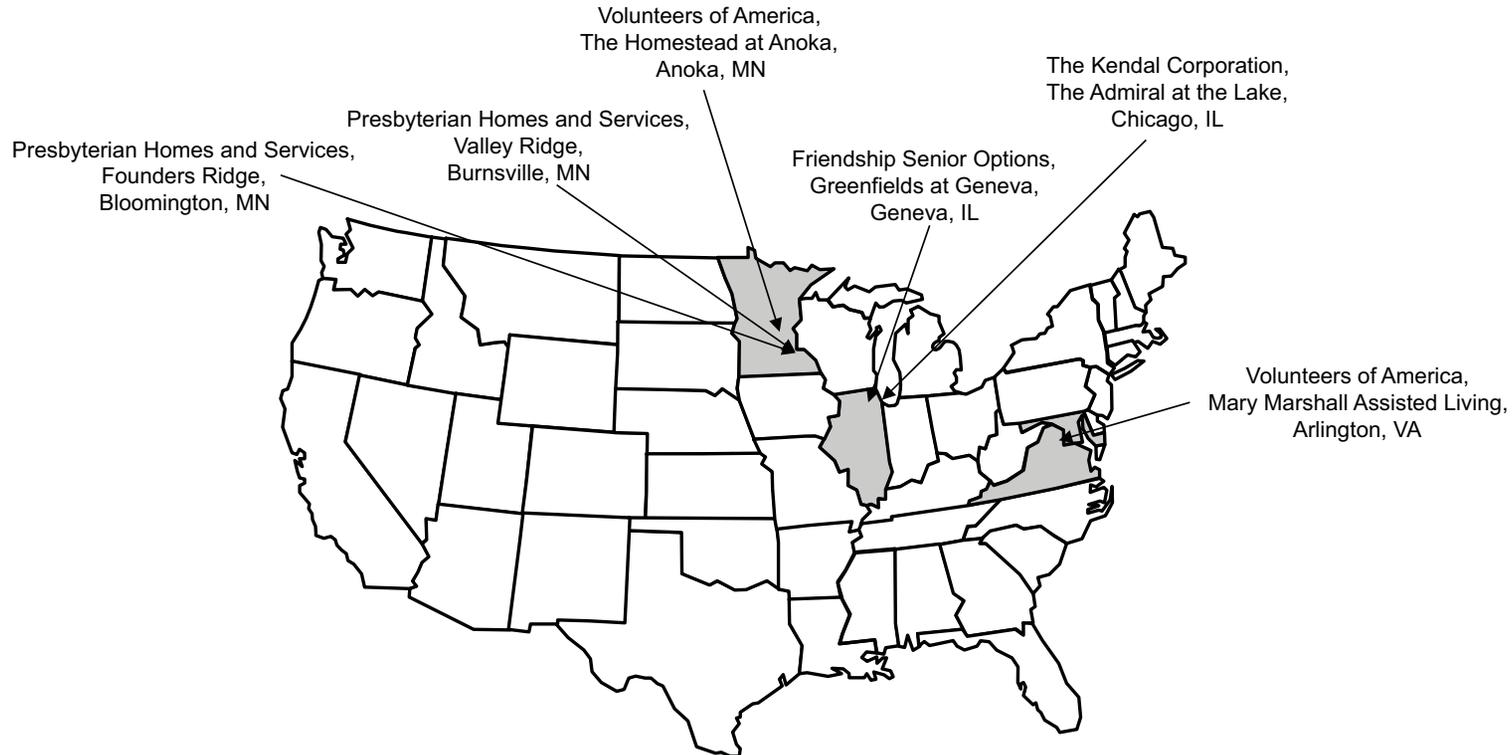
5-11b 2012 COMMUNITY OPENINGS

| 2013 Rank | System Name | Community | City | State | Community Type |
|-----------|---------------------------------|-------------------------------|-------------|-------|----------------|
| 4 | Presbyterian Homes and Services | Founders Ridge | Bloomington | MN | CCRC |
| 4 | Presbyterian Homes and Services | Valley Ridge | Burnsville | MN | ALF |
| 8 | The Kendal Corporation | The Admiral at the Lake | Chicago | IL | CCRC |
| 19 | Volunteers of America | The Homestead at Anoka | Anoka | MN | CCRC |
| 19 | Volunteers of America | Mary Marshall Assisted Living | Arlington | VA | ALF |
| 56 | Friendship Senior Options | Greenfields of Geneva | Geneva | IL | CCRC |

5-11 Growth: New Communities

Growth: New Communities

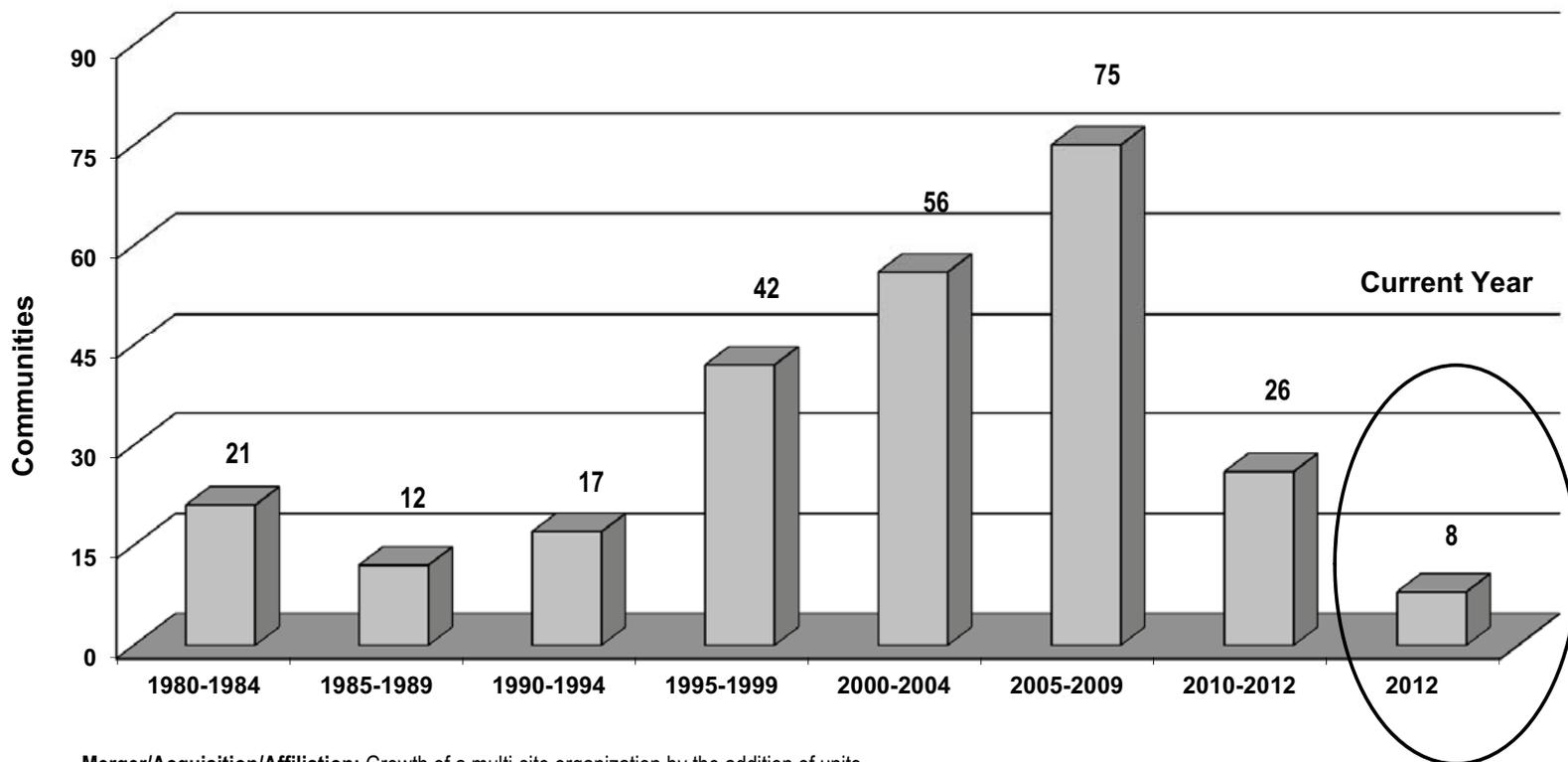
5-11c 2012 LOCATIONS



5-12 2013 LeadingAge Ziegler 100

Growth: Mergers/Acquisitions/Affiliations

5-12a HISTORICAL GROWTH



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

5-12 2013 LeadingAge Ziegler 100

Growth: Mergers/Acquisitions/Affiliations

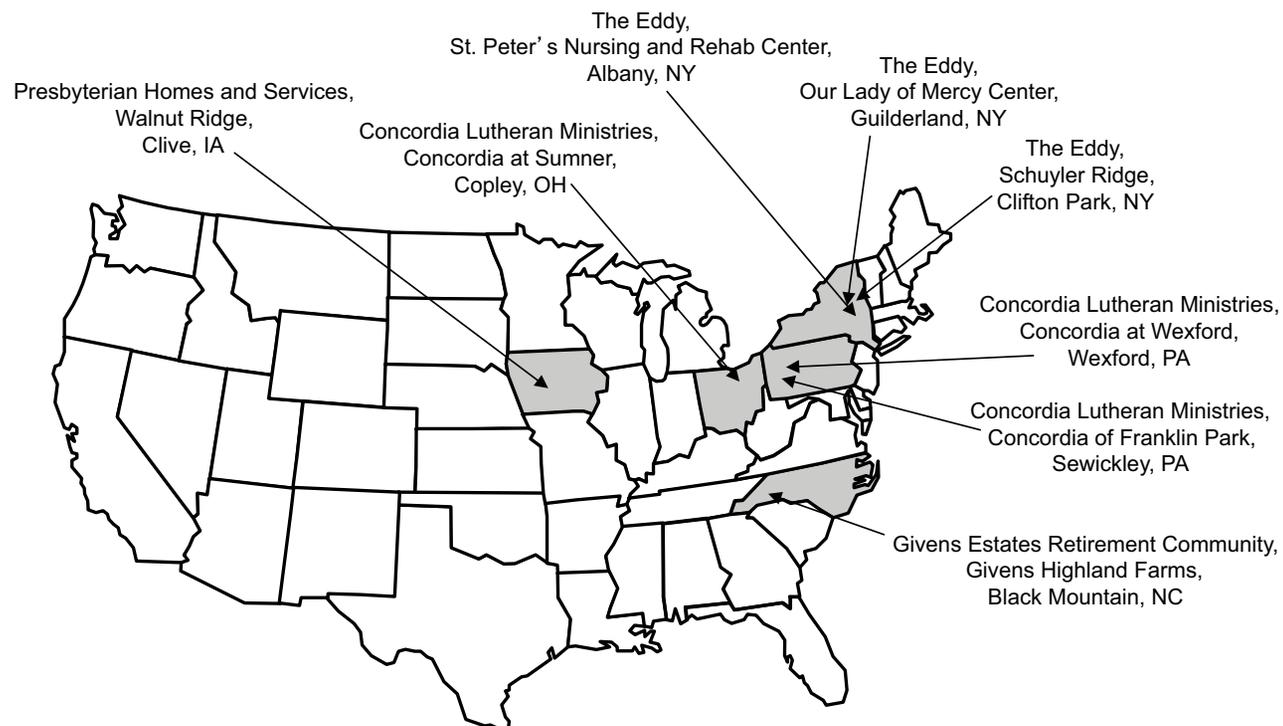
5-12b 2012 MERGERS/ACQUISITIONS/AFFILIATIONS

| 2013 Rank | System Name | Community | City | State | Community Type |
|-----------|--------------------------------------|--------------------------------------|----------------|-------|----------------|
| 4 | Presbyterian Homes and Services | Walnut Ridge | Clive | IA | CCRC |
| 30 | Concordia Lutheran Social Ministries | Concordia of Wexford | Wexford | PA | ALF |
| 30 | Concordia Lutheran Social Ministries | Concordia of Franklin Park | Sewickley | PA | ALF |
| 30 | Concordia Lutheran Social Ministries | Concordia at Sumner | Copley | OH | CCRC |
| 32 | The Eddy | Our Lady of Mercy Center | Guilderland | NY | SNF |
| 32 | The Eddy | St. Peter's Nursing and Rehab Center | Albany | NY | SNF |
| 32 | The Eddy | Schuyler Ridge | Clifton Park | NY | SNF |
| 97 | Givens Estates Retirement Community | Givens Highland Farms | Black Mountain | NC | CCRC |

5-12 Growth: Mergers/Acquisitions/Affiliations

Growth: Mergers/Acquisitions/Affiliations

5-12c 2013 LOCATIONS

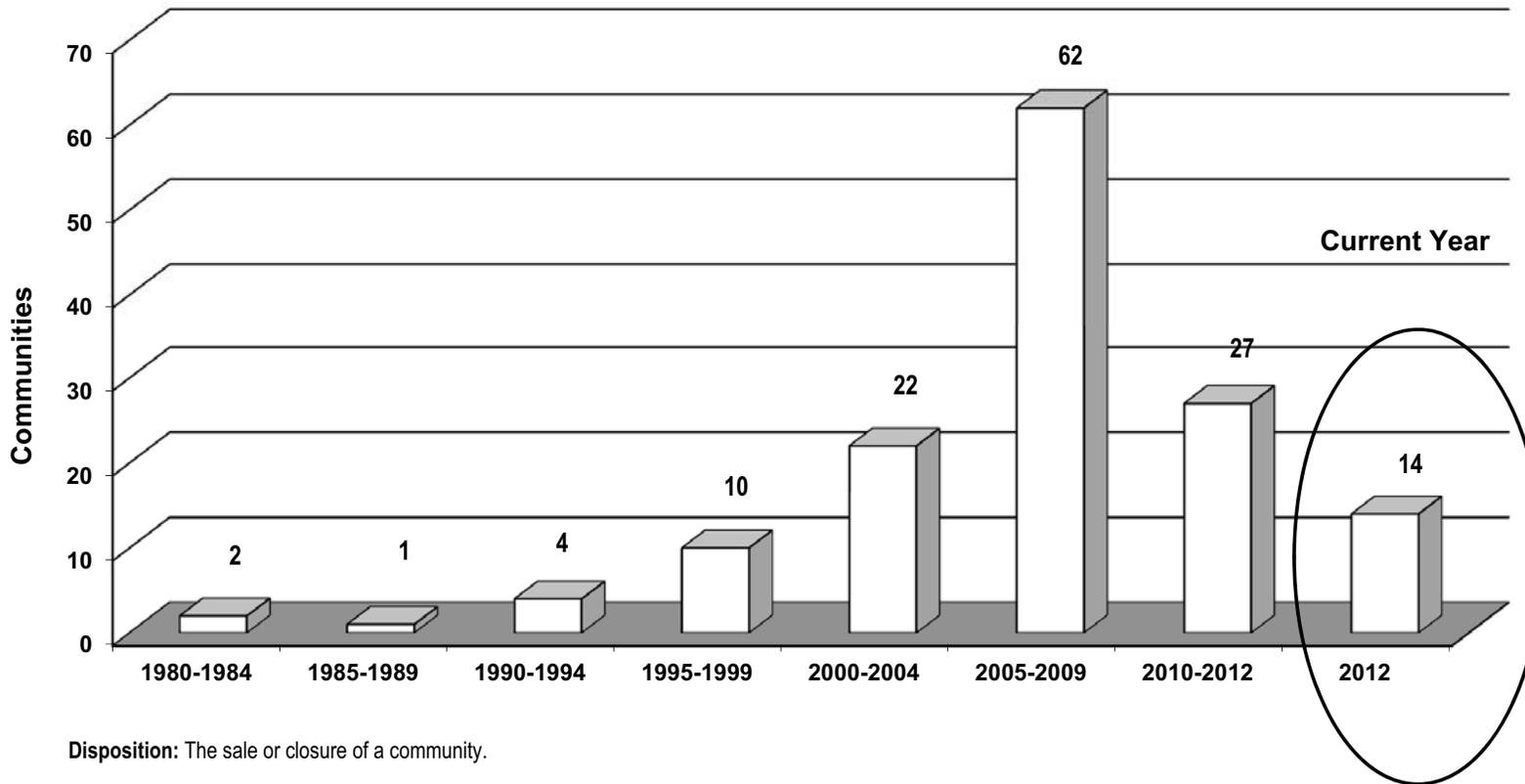


* Acquisitions of communities that were previously joint ventures.

5-13 2013 LeadingAge Ziegler 100

Growth: Dispositions

5-13a HISTORICAL GROWTH



Disposition: The sale or closure of a community.

5-13 2013 LeadingAge Ziegler 100

Growth: Dispositions

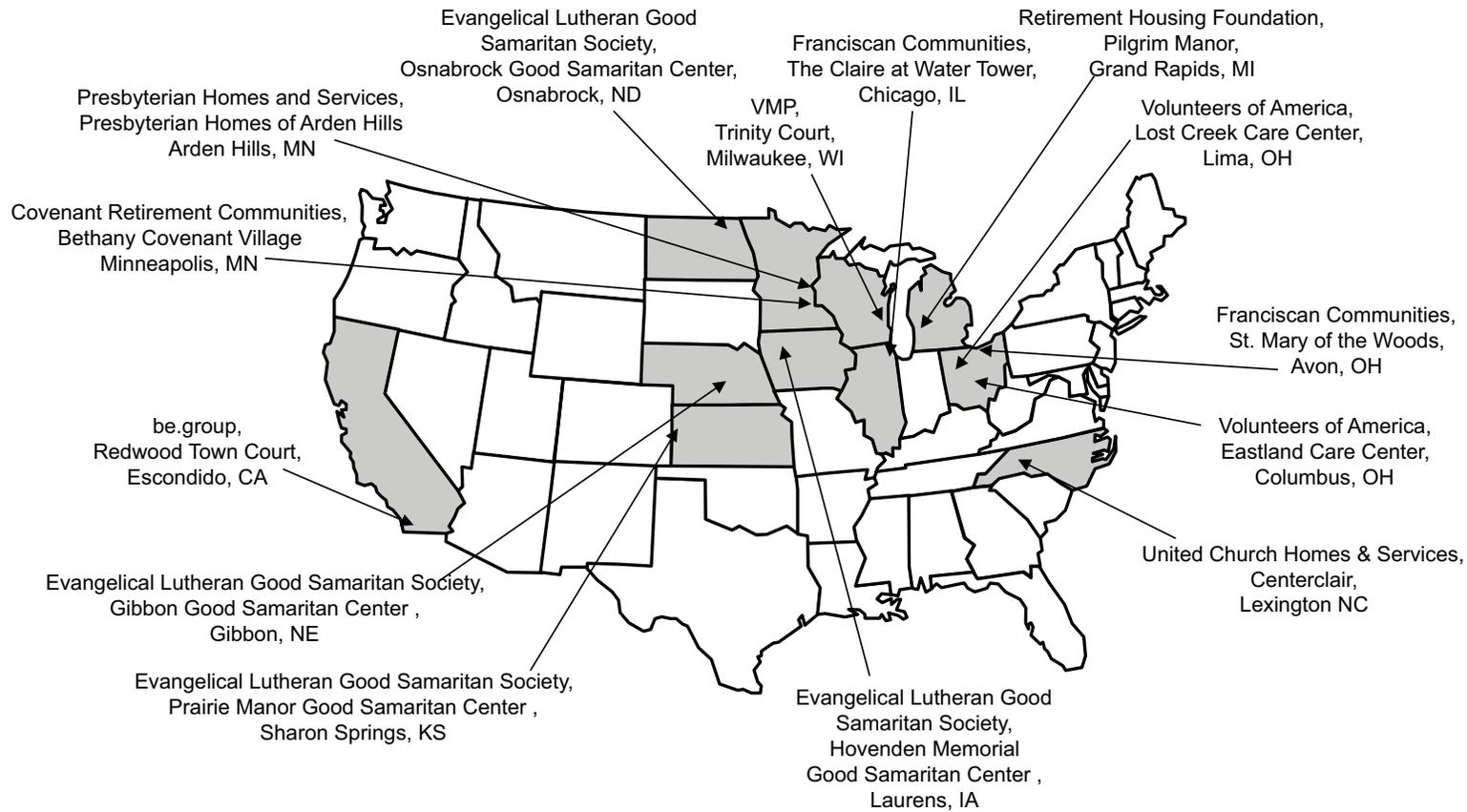
5-13b 2012 COMMUNITY CLOSURES OR DISPOSITIONS

| 2013 Rank | System Name | Community | City | State | Community Type |
|-----------|---|--|----------------|-------|----------------|
| 1 | Evangelical Lutheran Good Samaritan Society | Hovenden Memorial GS Center | Laurens | IA | SNF |
| 1 | Evangelical Lutheran Good Samaritan Society | Prairie Manor GS Center | Sharon Springs | KS | SNF |
| 1 | Evangelical Lutheran Good Samaritan Society | Osnabrock GS Center | Osnabrock | ND | SNF |
| 1 | Evangelical Lutheran Good Samaritan Society | Gibbon GSC | Gibbon | NE | ALF |
| 4 | Presbyterian Homes and Services | Presbyterian Homes of Arden Hills | Arden Hills | MN | CCRC |
| 5 | Covenant Retirement Communities | Bethany Covenant Village | Minneapolis | MN | ALF |
| 6 | Retirement Housing Foundation | Pilgrim Manor | Grand Rapids | MI | ALF |
| 19 | Volunteers of America | Eastland Care Center | Columbus | OH | SNF |
| 19 | Volunteers of America | Lost Creek Care Center | Lima | OH | SNF |
| 26 | Franciscan Communities | St. Mary of the Woods | Avon | OH | CCRC |
| 26 | Franciscan Communities | The Clare at Water Tower | Chicago | IL | CCRC |
| 43 | be.group | Redwood Town Court | Escondido | CA | CCRC |
| 80 | United Church Homes & Services | Centerclair (units/beds transferred to Piedm | Lexington | NC | SNF |
| 85 | VMP | Trinity Court | Milwaukee | WI | ILF |

5-13 Growth: Dispositions

Growth: Dispositions

5-13c 2012 LOCATIONS



LeadingAge 100 Ziegler

Chapter 6

Additional Listings

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

Single-Campus Senior Living Communities

A single-campus senior living community offers care at one location, or campus (Chart 6-1a). The single-campus communities are ranked by number of units. Single-campus communities may be part of a multi-site organization or may stand alone (that is, they are not part of a multi-site senior living organization [those that stand alone are listed in Chart 6-1b]). A number of these stand-alone single-campus communities are poised for growth from a single- to multi-site organization and may ultimately appear in the LZ 100 multi-site senior living organization listing.

Affordable (non market-rate) Housing Providers

Using the LeadingAge Directory of Members and LeadingAge contact information, systems providing affordable (non market-rate) and government-subsidized housing were researched and ranked according to the number of affordable housing units offered. This listing includes a number of organizations that are not on the LZ 100 multi-site senior living organization listing (Chart 6-2).

Systems by Total Market-Rate and Affordable Units

Chart 6-3 presents an aggregate ranking of unit types, market rate and affordable. 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 100 #31 (**Primary Ranking**) with 1,691 total market-rate units; the organization is ranked #1 among this year's listing of affordable housing providers with 16,143 total affordable units (Chart 6-2); by aggregating these two categories of seniors housing, the organization is the second largest among the LZ 100 with 17,965 total units.

6-1 2013 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

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

| 2013 Rank | 2012 Rank | Campus | System / Health System Affiliation | City | State | Summary of Market Rate Units (as of 12/31/12) | | | | % ILU | % ALU | % NCB |
|-----------|-----------|--|--------------------------------------|---------------|-------|--|-------|-----|-----|-------|-------|-------|
| | | | | | | Total | ILU | ALU | NCB | | | |
| 1 | 1 | Ridewood Village | National Senior Campuses | Silver Spring | MD | 2,268 | 1,947 | 207 | 114 | 85.8% | 9.1% | 5.0% |
| 2 | 3 | Oak Crest Village | National Senior Campuses | Parkville | MD | 1,858 | 1,525 | 133 | 200 | 82.1% | 7.2% | 10.8% |
| 3 | 4 | Charlestown | | Catonsville | MD | 1,768 | 1,437 | 125 | 206 | 81.3% | 7.1% | 11.7% |
| 4 | 5 | Cedar Crest Village | National Senior Campuses | Pequanock | NJ | 1,696 | 1,501 | 82 | 113 | 88.5% | 4.8% | 6.7% |
| 5 | 6 | Greenspring Village | National Senior Campuses | Springfield | VA | 1,685 | 1,405 | 144 | 136 | 83.4% | 8.5% | 8.1% |
| 6 | 7 | Shell Point Village | Christian Missionary Alliance | Fort Myers | FL | 1,671 | 1,221 | 252 | 198 | 73.1% | 15.1% | 11.8% |
| 7 | 8 | Ann's Choice | National Senior Campuses | Philadelphia | PA | 1,619 | 1,487 | 66 | 66 | 91.8% | 4.1% | 4.1% |
| 8 | 9 | Brooksby Village | National Senior Campuses | Peabody | MA | 1,542 | 1,344 | 94 | 104 | 87.2% | 6.1% | 6.7% |
| 9 | 2 | John Knox Village | | Lee's Summit | MO | 1,522 | 934 | 158 | 430 | 61.4% | 10.4% | 28.3% |
| 10 | 10 | Masonic Village at Elizabethtown | Masonic Villages | Elizabethtown | PA | 1,503 | 925 | 125 | 453 | 61.5% | 8.3% | 30.1% |
| 11 | 11 | Seabrook Village | National Senior Campuses | Tinton Falls | NJ | 1,266 | 1,088 | 92 | 86 | 85.9% | 7.3% | 6.8% |
| 12 | 12 | Asbury Methodist Village | Asbury Communities | Gaithersburg | MD | 1,199 | 809 | 133 | 257 | 67.5% | 11.1% | 21.4% |
| 13 | 13 | Linden Ponds | National Senior Campuses | Hingham | MA | 1,120 | 988 | 0 | 132 | 88.2% | 0.0% | 11.8% |
| 14 | 14 | Maris Grove | National Senior Campuses | Glen Mills | PA | 1,089 | 957 | 66 | 66 | 87.9% | 6.1% | 6.1% |
| 15 | 15 | Henry Ford Village | | Dearborn | MI | 1,041 | 856 | 96 | 89 | 82.2% | 9.2% | 8.5% |
| 16 | 16 | Friendship Village of Schaumburg | Friendship Senior Options | Schaumburg | IL | 1,006 | 659 | 99 | 248 | 65.5% | 9.8% | 24.7% |
| 17 | 17 | Hebrew Home at Riverdale* | | Bronx | NY | 1,004 | 134 | 0 | 870 | 13.3% | 0.0% | 86.7% |
| 18 | 18 | Panorama City | | Lacey | WA | 991 | 791 | 45 | 155 | 79.8% | 4.5% | 15.6% |
| 19 | 19 | John Knox Village of Florida | | Pompano Beach | FL | 972 | 733 | 62 | 177 | 75.4% | 6.4% | 18.2% |
| 20 | 20 | Willow Valley Lakes Manor | Willow Valley Retirement Communities | Lancaster | PA | 955 | 732 | 146 | 77 | 76.6% | 15.3% | 8.1% |
| 21 | 21 | Fox Run Village | National Senior Campuses | Novi | MI | 883 | 751 | 44 | 88 | 85.1% | 5.0% | 10.0% |
| 22 | 22 | Franklin United Methodist Community | | Franklin | IN | 864 | 197 | 459 | 208 | 22.8% | 53.1% | 24.1% |
| 23 | 23 | Westminster-Canterbury Richmond | | Richmond | VA | 847 | 520 | 169 | 158 | 61.4% | 20.0% | 18.7% |
| 24 | 25 | St. John's Home & Meadows* | | Rochester | NY | 814 | 339 | 0 | 475 | 41.6% | 0.0% | 58.4% |
| 25 | 24 | Cross Keys Village - The Brethren Home Community | | New Oxford | PA | 812 | 448 | 94 | 270 | 55.2% | 11.6% | 33.3% |

* No data received from provider for current reporting year

6-1 2013 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

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

| 2013 Rank | 2012 Rank | Campus | System / Health System Affiliation | City | State | Summary of Market Rate Units (as of 12/31/12) | | | | % ILU | % ALU | % NCB |
|-----------|-----------|--|--------------------------------------|----------------|-------|--|-----|-----|-----|-------|-------|-------|
| | | | | | | Total | ILU | ALU | NCB | | | |
| 26 | 26 | Friendship Village of Tempe | | Tempe | AZ | 808 | 575 | 91 | 142 | 71.2% | 11.3% | 17.6% |
| 27 | 27 | Menorah Park Center for Senior Living* | | Cleveland | OH | 790 | 200 | 230 | 360 | 25.3% | 29.1% | 45.6% |
| 28 | 28 | Rogue Valley Manor | Pacific Retirement Services | Medford | OR | 789 | 605 | 80 | 104 | 76.7% | 10.1% | 13.2% |
| 29 | 32 | Charles E. Smith Life Communities | | Rockville | MD | 785 | 151 | 78 | 556 | 19.2% | 9.9% | 70.8% |
| 30 | 29 | Greencroft Goshen | Greencroft, Inc. | Goshen | IN | 780 | 411 | 129 | 240 | 52.7% | 16.5% | 30.8% |
| 31 | 31 | Brethren Village Retirement Community | | Lancaster | PA | 774 | 513 | 141 | 120 | 66.3% | 18.2% | 15.5% |
| 32 | 30 | Lakeview Village | | Lenexa | KS | 768 | 570 | 26 | 172 | 74.2% | 3.4% | 22.4% |
| 33 | 33 | Mennonite Home Communities | | Lancaster | PA | 766 | 421 | 155 | 190 | 55.0% | 20.2% | 24.8% |
| 34 | 34 | Luther Manor - Wauwatosa Campus | Luther Manor | Wauwatosa | WI | 762 | 381 | 158 | 223 | 50.0% | 20.7% | 29.3% |
| 35 | 35 | Heritage Pointe | United Methodist Memorial Home | Warren | IN | 760 | 152 | 409 | 199 | 20.0% | 53.8% | 26.2% |
| 36 | 36 | Otterbein Lebanon Retirement Community | Otterbein Retirement Communities | Lebanon | OH | 718 | 414 | 48 | 256 | 57.7% | 6.7% | 35.7% |
| 37 | 37 | Concordia at Cabot | Concordia Lutheran Ministries | Cabot | PA | 715 | 330 | 249 | 136 | 46.2% | 34.8% | 19.0% |
| 38 | 43 | Glencroft Retirement Community | | Glendale | AZ | 715 | 391 | 123 | 201 | 54.7% | 17.2% | 28.1% |
| 39 | 39 | St. Ann's Community | St. Ann's Community | Rochester | NY | 711 | 120 | 0 | 591 | 16.9% | 0.0% | 83.1% |
| 40 | 38 | Willow Valley Manor North | Willow Valley Retirement Communities | Lancaster | PA | 711 | 472 | 107 | 132 | 66.4% | 15.0% | 18.6% |
| 41 | 40 | Garden Spot Village | Garden Spot Village | New Holland | PA | 701 | 542 | 86 | 73 | 77.3% | 12.3% | 10.4% |
| 42 | 41 | Bethany Lutheran Village* | Graceworks Lutheran Services | Dayton | OH | 700 | 386 | 62 | 252 | 55.1% | 8.9% | 36.0% |
| 43 | 42 | Western Home Communities - Main Campus | Western Home Communities | Cedar Falls | IA | 693 | 363 | 230 | 100 | 52.4% | 33.2% | 14.4% |
| 44 | 44 | Atlantic Shores | | Virginia Beach | VA | 672 | 555 | 67 | 50 | 82.6% | 10.0% | 7.4% |
| 45 | 45 | Raybrook Manor | Holland Home | Grand Rapids | MI | 665 | 299 | 265 | 101 | 45.0% | 39.8% | 15.2% |
| 46 | 46 | Miami Jewish Health Systems | | Miami | FL | 656 | 102 | 92 | 462 | 15.5% | 14.0% | 70.4% |
| 47 | 47 | Laclede Groves | Lutheran Senior Services | Webster Groves | MO | 655 | 304 | 131 | 220 | 46.4% | 20.0% | 33.6% |
| 48 | 48 | The Beatitudes Campus | | Phoenix | AZ | 649 | 456 | 121 | 72 | 70.3% | 18.6% | 11.1% |
| 49 | 49 | Copeland Oaks | | Sebring | OH | 645 | 375 | 72 | 198 | 58.1% | 11.2% | 30.7% |
| 50 | 50 | The Village in Gainesville | SantaFe SeniorLiving | Gainesville | FL | 641 | 510 | 131 | 0 | 79.6% | 20.4% | 0.0% |

* No data received from provider for current reporting year

6-1 2013 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

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

| 2013 Rank | 2012 Rank | Campus | System / Health System Affiliation | City | State | Summary of Market Rate Units (as of 12/31/12) | | | | % ILU | % ALU | % NCB |
|-----------|-----------|---|--|-----------------|-------|--|-----|-----|-----|--------|-------|-------|
| | | | | | | Total | ILU | ALU | NCB | | | |
| 51 | 53 | Westminster-Canterbury on Chesapeake Bay* | | Virginia Beach | VA | 629 | 439 | 95 | 95 | 69.8% | 15.1% | 15.1% |
| 52 | 54 | Kissimmee Good Samaritan Retirement Village | Evanglical Lutheran Good Samaritan Society | Kissimmee | FL | 626 | 423 | 33 | 170 | 67.6% | 5.3% | 27.2% |
| 53 | 56 | Landis Homes | | Lancaster | PA | 626 | 426 | 97 | 103 | 68.1% | 15.5% | 16.5% |
| 54 | 55 | John Knox Village of Tampa Bay | St. Joseph's Health System | Tampa | FL | 622 | 304 | 155 | 163 | 48.9% | 24.9% | 26.2% |
| 55 | 57 | Messiah Village | Messiah Lifeways | Mechanicsburg | PA | 620 | 278 | 158 | 184 | 44.8% | 25.5% | 29.7% |
| 56 | 52 | La Posada at Park Centre | | Green Valley | AZ | 616 | 466 | 110 | 40 | 75.6% | 17.9% | 6.5% |
| 57 | 58 | NewBridge on the Charles | Hebrew SeniorLife | Dedham | MA | 615 | 256 | 91 | 268 | 41.6% | 14.8% | 43.6% |
| 58 | 71 | Carolina Meadows | | Chapel Hill | NC | 598 | 429 | 79 | 90 | 71.7% | 13.2% | 15.1% |
| 59 | 59 | Air Force Village West* | | Riverside | CA | 591 | 440 | 92 | 59 | 74.5% | 15.6% | 10.0% |
| 60 | 60 | Springmoor Life Care Retirement Community | | Raleigh | NC | 589 | 398 | 18 | 173 | 67.6% | 3.1% | 29.4% |
| 61 | 61 | The Army Residence Community | | San Antonio | TX | 587 | 418 | 78 | 91 | 71.2% | 13.3% | 15.5% |
| 62 | 62 | Oakwood Village West Campus | Oakwood Lutheran Senior Ministries | Madison | WI | 582 | 387 | 100 | 95 | 66.5% | 17.2% | 16.3% |
| 63 | 66 | Good Samaritan Village of Hastings | Evanglical Lutheran Good Samaritan Society | Hastings | NE | 575 | 320 | 51 | 204 | 55.7% | 8.9% | 35.5% |
| 64 | 65 | Windcrest Village | National Senior Campuses | Highlands Ranch | CO | 575 | 575 | 0 | 0 | 100.0% | 0.0% | 0.0% |
| 65 | 68 | Bristol Village | National Church Residences | Waverly | OH | 571 | 465 | 31 | 75 | 81.4% | 5.4% | 13.1% |
| 66 | 69 | Bethany Village | Asbury Communities | Mechanicsburg | PA | 569 | 400 | 100 | 69 | 70.3% | 17.6% | 12.1% |
| 67 | 64 | The Philadelphia Protestant Home | | Philadelphia | PA | 567 | 266 | 175 | 126 | 46.9% | 30.9% | 22.2% |
| 68 | 84 | Moorings Park | | Naples | FL | 565 | 386 | 73 | 106 | 68.3% | 12.9% | 18.8% |
| 69 | 70 | Havenwood - Heritage Heights | | Concord | NH | 559 | 409 | 55 | 95 | 73.2% | 9.8% | 17.0% |
| 70 | 72 | Twin Lakes Community | | Burlington | NC | 558 | 386 | 52 | 120 | 69.2% | 9.3% | 21.5% |
| 71 | 73 | Royal Oaks | | Sun City | AZ | 557 | 373 | 59 | 125 | 67.0% | 10.6% | 22.4% |
| 72 | 74 | Presbyterian Village North | Presbyterian Communities & Services | Dallas | TX | 556 | 250 | 75 | 231 | 45.0% | 13.5% | 41.5% |
| 73 | 75 | Ashlar Village | Masonicare | Wallingford | CT | 553 | 362 | 191 | 0 | 65.5% | 34.5% | 0.0% |
| 74 | 76 | Passavant Retirement Community | Lutheran SeniorLife | Zelienople | PA | 552 | 226 | 168 | 158 | 40.9% | 30.4% | 28.6% |
| 75 | 63 | St. Camillus | | Wauwatosa | WI | 551 | 285 | 199 | 67 | 51.7% | 36.1% | 12.2% |

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6-1 2013 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

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

| 2013 Rank | 2012 Rank | Campus | System / Health System Affiliation | City | State | Summary of Market Rate Units (as of 12/31/12) | | | | % ILU | % ALU | % NCB |
|-----------|-----------|--|------------------------------------|------------------|-------|--|-----|-----|-----|-------|-------|-------|
| | | | | | | Total | ILU | ALU | NCB | | | |
| 76 | 77 | Carroll Lutheran Village | | Westminster | MD | 551 | 398 | 50 | 103 | 72.2% | 9.1% | 18.7% |
| 77 | 78 | Westminster Place | Presbyterian Homes | Evanston | IL | 550 | 256 | 103 | 191 | 46.5% | 18.7% | 34.7% |
| 78 | 79 | Mayflower Gardens | Retirement Housing Foundation | Lancaster | CA | 548 | 494 | 6 | 48 | 90.1% | 1.1% | 8.8% |
| 79 | 80 | Croasdaile | United Methodist Retirement Homes | Durham | NC | 546 | 402 | 30 | 114 | 73.6% | 5.5% | 20.9% |
| 80 | 81 | Casa de las Campanas* | | San Diego | CA | 545 | 380 | 66 | 99 | 69.7% | 12.1% | 18.2% |
| 81 | 82 | Rolling Green Village | | Greenville | SC | 544 | 420 | 50 | 74 | 77.2% | 9.2% | 13.6% |
| 82 | 83 | Phoebe Home | Phoebe Ministries | Allentown | PA | 538 | 88 | 55 | 395 | 16.4% | 10.2% | 73.4% |
| 83 | 85 | Masonic Care Community of New York | | Utica | NY | 535 | 135 | 80 | 320 | 25.2% | 15.0% | 59.8% |
| 84 | 87 | Mission Ridge & St. John's Lutheran Home | St. John's Lutheran Ministries | Billings | MT | 534 | 122 | 226 | 186 | 22.8% | 42.3% | 34.8% |
| 85 | 86 | Westminster Oaks | Westminster Communities of Florida | Tallahassee | FL | 534 | 327 | 87 | 120 | 61.2% | 16.3% | 22.5% |
| 86 | 88 | St. Joseph of the Pines* | Catholic Health East | Southern Pines | NC | 532 | 303 | 62 | 167 | 57.0% | 11.7% | 31.4% |
| 87 | 89 | St. Leonard | Sylvania Franciscan Health | Centerville | OH | 530 | 250 | 160 | 120 | 47.2% | 30.2% | 22.6% |
| 88 | 90 | Windsor Park Manor | Covenant Retirement Communities | Carol Stream | IL | 529 | 362 | 90 | 77 | 68.4% | 17.0% | 14.6% |
| 89 | 91 | Maple Knoll | Maple Knoll Communities | Springdale | OH | 528 | 279 | 63 | 186 | 52.8% | 11.9% | 35.2% |
| 90 | 92 | Air Force Village I | Air Force Village | San Antonio | TX | 526 | 383 | 39 | 104 | 72.8% | 7.4% | 19.8% |
| 91 | 93 | Cristwood Retirement Community* | CRISTA | Seattle | WA | 524 | 276 | 81 | 167 | 52.7% | 15.5% | 31.9% |
| 92 | 95 | The Mennonite Village | | Albany | OR | 524 | 298 | 131 | 95 | 56.9% | 25.0% | 18.1% |
| 93 | 94 | Luther Acres Retirement Community | LutherCare | Lititz | PA | 523 | 347 | 70 | 106 | 66.3% | 13.4% | 20.3% |
| 94 | 96 | Pine Run Community* | Doylestown Hospital | Doylestown | PA | 521 | 288 | 159 | 74 | 55.3% | 30.5% | 14.2% |
| 95 | 98 | Bridgewater Retirement Community* | | Bridgewater | VA | 519 | 246 | 134 | 139 | 47.4% | 25.8% | 26.8% |
| 96 | 99 | Boutwells Landing | Presbyterian Homes and Services | Oak Park Heights | MN | 518 | 315 | 95 | 108 | 60.8% | 18.3% | 20.8% |
| 97 | 100 | Air Force Village II | Air Force Villages | San Antonio | TX | 516 | 401 | 51 | 64 | 77.7% | 9.9% | 12.4% |
| 98 | 101 | The Holmstad | Covenant Retirement Communities | Batavia | IL | 515 | 358 | 62 | 95 | 69.5% | 12.0% | 18.4% |
| 99 | 102 | The Lutheran Home | | Cape Girardeau | MO | 515 | 137 | 115 | 263 | 26.6% | 22.3% | 51.1% |
| 100 | 103 | St. Therese of New Hope | St. Therese Homes, Inc. | New Hope | MN | 514 | 220 | 0 | 294 | 42.8% | 0.0% | 57.2% |

* No data received from provider for current reporting year

6-1 2013 LeadingAge Ziegler 100

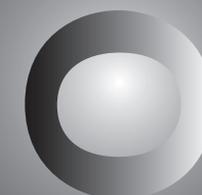
Additional Listings: Single-Campus Senior Living Communities

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

| 2013 Rank | Campus | City | State | Summary of Market Rate Units (as of 12/31/12) | | | | % ILU | % ALU | % NCB |
|-----------|--|----------------|-------|--|-------|-----|-----|-------|-------|-------|
| | | | | Total | ILU | ALU | NCB | | | |
| 1 | Charlestown | Catonsville | MD | 1,768 | 1,437 | 125 | 206 | 81.3% | 7.1% | 11.7% |
| 2 | John Knox Village | Lee's Summit | MO | 1,522 | 934 | 158 | 430 | 61.4% | 10.4% | 28.3% |
| 3 | Henry Ford Village | Dearborn | MI | 1,041 | 856 | 96 | 89 | 82.2% | 9.2% | 8.5% |
| 4 | Hebrew Home at Riverdale* | Bronx | NY | 1,004 | 134 | 0 | 870 | 13.3% | 0.0% | 86.7% |
| 5 | Panorama City | Lacey | WA | 991 | 791 | 45 | 155 | 79.8% | 4.5% | 15.6% |
| 6 | John Knox Village of Florida | Pompano Beach | FL | 972 | 733 | 62 | 177 | 75.4% | 6.4% | 18.2% |
| 7 | Franklin United Methodist Community | Franklin | IN | 864 | 197 | 459 | 208 | 22.8% | 53.1% | 24.1% |
| 8 | Westminster-Canterbury Richmond | Richmond | VA | 847 | 520 | 169 | 158 | 61.4% | 20.0% | 18.7% |
| 9 | St. John's Home & Meadows* | Rochester | NY | 814 | 339 | 0 | 475 | 41.6% | 0.0% | 58.4% |
| 10 | Cross Keys Village - The Brethren Home Community | New Oxford | PA | 812 | 448 | 94 | 270 | 55.2% | 11.6% | 33.3% |
| 11 | Friendship Village of Tempe | Tempe | AZ | 808 | 575 | 91 | 142 | 71.2% | 11.3% | 17.6% |
| 12 | Menorah Park Center for Senior Living* | Cleveland | OH | 790 | 200 | 230 | 360 | 25.3% | 29.1% | 45.6% |
| 13 | Charles E. Smith Life Communities | Rockville | MD | 785 | 151 | 78 | 556 | 19.2% | 9.9% | 70.8% |
| 14 | Brethren Village Retirement Community | Lancaster | PA | 774 | 513 | 141 | 120 | 66.3% | 18.2% | 15.5% |
| 15 | Lakeview Village | Lenexa | KS | 768 | 570 | 26 | 172 | 74.2% | 3.4% | 22.4% |
| 16 | Mennonite Home Communities | Lancaster | PA | 766 | 421 | 155 | 190 | 55.0% | 20.2% | 24.8% |
| 17 | Glencroft Retirement Community | Glendale | AZ | 715 | 391 | 123 | 201 | 54.7% | 17.2% | 28.1% |
| 18 | Atlantic Shores | Virginia Beach | VA | 672 | 555 | 67 | 50 | 82.6% | 10.0% | 7.4% |
| 19 | Miami Jewish Health Systems | Miami | FL | 656 | 102 | 92 | 462 | 15.5% | 14.0% | 70.4% |
| 20 | The Beatitudes Campus | Phoenix | AZ | 649 | 456 | 121 | 72 | 70.3% | 18.6% | 11.1% |
| 21 | Copeland Oaks | Sebring | OH | 645 | 375 | 72 | 198 | 58.1% | 11.2% | 30.7% |
| 22 | Westminster-Canterbury on Chesapeake Bay* | Virginia Beach | VA | 629 | 439 | 95 | 95 | 69.8% | 15.1% | 15.1% |
| 23 | Landis Homes | Lancaster | PA | 626 | 426 | 97 | 103 | 68.1% | 15.5% | 16.5% |
| 24 | La Posada at Park Centre | Green Valley | AZ | 616 | 466 | 110 | 40 | 75.6% | 17.9% | 6.5% |
| 25 | Carolina Meadows | Chapel Hill | NC | 598 | 429 | 79 | 90 | 71.7% | 13.2% | 15.1% |

* No data received from provider for current reporting year

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Additional Listings: Single-Campus Senior Living Communities

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

| 2013 Rank | Campus | City | State | Summary of Market Rate Units (as of 12/31/12) | | | | % ILU | % ALU | % NCB |
|-----------|---|----------------|-------|--|-----|-----|-----|-------|-------|-------|
| | | | | Total | ILU | ALU | NCB | | | |
| 26 | Air Force Village West* | Riverside | CA | 591 | 440 | 92 | 59 | 74.5% | 15.6% | 10.0% |
| 27 | Springmoor Life Care Retirement Community | Raleigh | NC | 589 | 398 | 18 | 173 | 67.6% | 3.1% | 29.4% |
| 28 | The Army Residence Community | San Antonio | TX | 587 | 418 | 78 | 91 | 71.2% | 13.3% | 15.5% |
| 29 | The Philadelphia Protestant Home | Philadelphia | PA | 567 | 266 | 175 | 126 | 46.9% | 30.9% | 22.2% |
| 30 | Moorings Park | Naples | FL | 565 | 386 | 73 | 106 | 68.3% | 12.9% | 18.8% |
| 31 | Havenwood - Heritage Heights | Concord | NH | 559 | 409 | 55 | 95 | 73.2% | 9.8% | 17.0% |
| 32 | Twin Lakes Community | Burlington | NC | 558 | 386 | 52 | 120 | 69.2% | 9.3% | 21.5% |
| 33 | Royal Oaks | Sun City | AZ | 557 | 373 | 59 | 125 | 67.0% | 10.6% | 22.4% |
| 34 | Carroll Lutheran Village | Westminster | MD | 551 | 398 | 50 | 103 | 72.2% | 9.1% | 18.7% |
| 35 | St. Camillus | Wauwatosa | WI | 551 | 285 | 199 | 67 | 51.7% | 36.1% | 12.2% |
| 36 | Casa de las Campanas* | San Diego | CA | 545 | 380 | 66 | 99 | 69.7% | 12.1% | 18.2% |
| 37 | Rolling Green Village | Greenville | SC | 544 | 420 | 50 | 74 | 77.2% | 9.2% | 13.6% |
| 38 | Masonic Care Community of New York | Utica | NY | 535 | 135 | 80 | 320 | 25.2% | 15.0% | 59.8% |
| 39 | The Mennonite Village | Albany | OR | 524 | 298 | 131 | 95 | 56.9% | 25.0% | 18.1% |
| 40 | Bridgewater Retirement Community* | Bridgewater | VA | 519 | 246 | 134 | 139 | 47.4% | 25.8% | 26.8% |
| 41 | The Lutheran Home | Cape Girardeau | MO | 515 | 137 | 115 | 263 | 26.6% | 22.3% | 51.1% |
| 42 | Wesley Willows | Rockford | IL | 515 | 254 | 170 | 91 | 49.3% | 33.0% | 17.7% |
| 43 | The Advent Christian Village | Dowling Park | FL | 510 | 309 | 40 | 161 | 60.6% | 7.8% | 31.6% |
| 44 | Fleet Landing | Atlantic Beach | FL | 506 | 354 | 72 | 80 | 70.0% | 14.2% | 15.8% |
| 45 | St. Mark Village* | Palm Harbor | FL | 503 | 292 | 151 | 60 | 58.1% | 30.0% | 11.9% |
| 46 | Riddle Village | Media | PA | 500 | 365 | 49 | 86 | 73.0% | 9.8% | 17.2% |
| 47 | Friendship Village Sunset Hills | St. Louis | MO | 497 | 318 | 61 | 118 | 64.0% | 12.3% | 23.7% |
| 48 | Lebanon Valley Brethren Home | Palmyra | PA | 495 | 337 | 58 | 100 | 68.1% | 11.7% | 20.2% |
| 49 | Warm Hearth Village | Blacksburg | VA | 495 | 285 | 150 | 60 | 57.6% | 30.3% | 12.1% |
| 50 | Marquette Manor | Indianapolis | IN | 493 | 314 | 77 | 102 | 63.7% | 15.6% | 20.7% |

* No data received from provider for current reporting year

6-1 2013 LeadingAge Ziegler 100

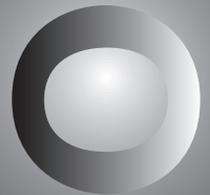
Additional Listings: Single-Campus Senior Living Communities

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

| 2013 Rank | Campus | City | State | Summary of Market Rate Units (as of 12/31/12) | | | | % ILU | % ALU | % NCB |
|-----------|--|------------------|-------|--|-----|-----|-----|-------|-------|-------|
| | | | | Total | ILU | ALU | NCB | | | |
| 51 | The Estates at Carpenters | Lakeland | FL | 493 | 372 | 49 | 72 | 75.5% | 9.9% | 14.6% |
| 52 | C. C. Young | Dallas | TX | 478 | 239 | 113 | 126 | 50.0% | 23.6% | 26.4% |
| 53 | Horizon House | Seattle | WA | 476 | 388 | 88 | 0 | 81.5% | 18.5% | 0.0% |
| 54 | White Horse Village | Newtown Square | PA | 474 | 347 | 68 | 59 | 73.2% | 14.3% | 12.4% |
| 55 | Deerfield Episcopal Retirement Community* | Asheville | NC | 473 | 351 | 60 | 62 | 74.2% | 12.7% | 13.1% |
| 56 | Cypress Cove at Healthpark Florida | Fort Meyers | FL | 470 | 362 | 44 | 64 | 77.0% | 9.4% | 13.6% |
| 57 | Virginia Mennonite Retirement Community (VMRC) | Harrisonburg | VA | 469 | 263 | 86 | 120 | 56.1% | 18.3% | 25.6% |
| 58 | Carolina Village | Hendersonville | NC | 465 | 347 | 60 | 58 | 74.6% | 12.9% | 12.5% |
| 59 | La Vida Llena | Albuquerque | NM | 464 | 330 | 84 | 50 | 71.1% | 18.1% | 10.8% |
| 60 | Masonic Pathways | Alma | MI | 463 | 38 | 221 | 204 | 8.2% | 47.7% | 44.1% |
| 61 | Tel Hai Retirement Community | Honey Brook | PA | 462 | 233 | 90 | 139 | 50.4% | 19.5% | 30.1% |
| 62 | The Wesley Community | Saratoga Springs | NY | 456 | 60 | 40 | 356 | 13.2% | 8.8% | 78.1% |
| 63 | Paradise Valley Estates | Fairfield | CA | 455 | 327 | 68 | 60 | 71.9% | 14.9% | 13.2% |
| 64 | Christian Health Care Center | Wyckoff | NJ | 448 | 55 | 95 | 298 | 12.3% | 21.2% | 66.5% |
| 65 | Aldersgate | Charlotte | NC | 447 | 255 | 92 | 100 | 57.0% | 20.6% | 22.4% |
| 66 | Falcons Landing | Potomac Falls | VA | 447 | 316 | 71 | 60 | 70.7% | 15.9% | 13.4% |
| 67 | Lutheran Social Services of Upstate New York* | Jamestown | NY | 446 | 136 | 96 | 214 | 30.5% | 21.5% | 48.0% |
| 68 | Aldersgate Village | Topeka | KS | 445 | 176 | 60 | 209 | 39.6% | 13.5% | 47.0% |
| 69 | Cathedral Village | Philadelphia | PA | 441 | 293 | 0 | 148 | 66.4% | 0.0% | 33.6% |
| 70 | Greenwood Village South | Greenwood | IN | 441 | 259 | 45 | 137 | 58.7% | 10.2% | 31.1% |
| 71 | Skaalen Retirement Services* | Stoughton | WI | 437 | 229 | 50 | 158 | 52.4% | 11.4% | 36.2% |
| 72 | Mt. San Antonio Gardens | Pomona | CA | 431 | 296 | 71 | 64 | 68.7% | 16.5% | 14.8% |
| 73 | Williamsburg Landing | Williamsburg | VA | 429 | 310 | 61 | 58 | 72.3% | 14.2% | 13.5% |
| 74 | Laurel Lake Retirement Community | Hudson | OH | 426 | 292 | 59 | 75 | 68.5% | 13.8% | 17.6% |
| 75 | Forum at Rancho San Antonio* | Cupertino | CA | 425 | 319 | 58 | 48 | 75.1% | 13.6% | 11.3% |

* No data received from provider for current reporting year

LeadingAge



Ziegler

6-1 2013 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

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

| 2013 Rank | Campus | City | State | Summary of Market Rate Units (as of 12/31/12) | | | | % ILU | % ALU | % NCB |
|-----------|--|----------------|-------|--|-----|-----|-----|-------|-------|-------|
| | | | | Total | ILU | ALU | NCB | | | |
| 76 | Cornwall Manor | Cornwall | PA | 424 | 286 | 30 | 108 | 67.5% | 7.1% | 25.5% |
| 77 | O'Connor Woods | Stockton | CA | 424 | 247 | 77 | 100 | 58.3% | 18.2% | 23.6% |
| 78 | The Good Samaritan Home of Quincy | Quincy | IL | 424 | 167 | 26 | 231 | 39.4% | 6.1% | 54.5% |
| 79 | Mease Manor* | Dunedin | FL | 422 | 216 | 106 | 100 | 51.2% | 25.1% | 23.7% |
| 80 | Carillon* | Lubbock | TX | 418 | 255 | 43 | 120 | 61.0% | 10.3% | 28.7% |
| 81 | Marquardt Village | Watertown | WI | 418 | 230 | 48 | 140 | 55.0% | 11.5% | 33.5% |
| 82 | Westminster Canterbury of Lynchburg | Lynchburg | VA | 413 | 245 | 63 | 105 | 59.3% | 15.3% | 25.4% |
| 83 | Meadowood | Worchester | PA | 411 | 296 | 56 | 59 | 72.0% | 13.6% | 14.4% |
| 84 | Emerald Heights | Redmond | WA | 407 | 290 | 56 | 61 | 71.3% | 13.8% | 15.0% |
| 85 | Bay Village of Sarasota | Sarasota | FL | 406 | 289 | 22 | 95 | 71.2% | 5.4% | 23.4% |
| 86 | Carol Woods Retirement Community* | Chapel Hill | NC | 405 | 292 | 83 | 30 | 72.1% | 20.5% | 7.4% |
| 87 | Indiana Masonic Home | Franklin | IN | 404 | 183 | 84 | 137 | 45.3% | 20.8% | 33.9% |
| 88 | Dunwoody Village | Newtown Square | PA | 403 | 241 | 81 | 81 | 59.8% | 20.1% | 20.1% |
| 89 | Friendship Village Chesterfield | Chesterfield | MO | 403 | 282 | 22 | 99 | 70.0% | 5.5% | 24.6% |
| 90 | Penney Retirement Community | Penney Farms | FL | 403 | 288 | 75 | 40 | 71.5% | 18.6% | 9.9% |
| 91 | Pennswood Village | Newtown | PA | 400 | 310 | 37 | 53 | 77.5% | 9.3% | 13.3% |
| 92 | Willamette View* | Portland | OR | 400 | 279 | 115 | 6 | 69.8% | 28.8% | 1.5% |
| 93 | Franciscan Oaks* | Denville | NJ | 398 | 285 | 34 | 79 | 71.6% | 8.5% | 19.8% |
| 94 | St. Paul Homes | Greenville | PA | 398 | 86 | 120 | 192 | 21.6% | 30.2% | 48.2% |
| 95 | Kahala Nui | Honolulu | HI | 393 | 270 | 63 | 60 | 68.7% | 16.0% | 15.3% |
| 96 | Fellowship Village | Basking Ridge | NJ | 392 | 257 | 81 | 54 | 65.6% | 20.7% | 13.8% |
| 97 | Heath Village* | Hackettstown | NJ | 390 | 251 | 40 | 99 | 64.4% | 10.3% | 25.4% |
| 98 | The Virginian* | Fairfax | VA | 386 | 224 | 62 | 100 | 58.0% | 16.1% | 25.9% |
| 99 | Arbor Acres United Methodist Retirement Community* | Winston Salem | NC | 384 | 235 | 96 | 53 | 61.2% | 25.0% | 13.8% |
| 100 | Brevillier Village* | Erie | PA | 384 | 191 | 108 | 85 | 49.7% | 28.1% | 22.1% |

* No data received from provider for current reporting year

6-2 2013 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

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

| 2013 Rank | 2012 Rank | System Name | State | Units | Communities ^Δ |
|-----------|-----------|--|-------|--------|--------------------------|
| 1 | 1 | National Church Residences | OH | 16,143 | 226 |
| 2 | 2 | Retirement Housing Foundation | CA | 10,092 | 115 |
| 3 | 3 | Volunteers of America | VA | 9,834 | 160 |
| 4 | 4 | Mercy Housing | CO | 5,457 | 79 |
| 5 | 5 | Christian Church Homes of Northern California | CA | 5,052 | 61 |
| 6 | 7 | Elderly Housing Development and Operations Corporation | FL | 4,296 | 55 |
| 7 | 6 | Senior Housing Assistance Group | WA | 4,163 | 26 |
| 8 | 8 | TELACU Residential Management* | CA | 2,625 | 35 |
| 9 | 9 | Catholic Housing Management* | FL | 2,246 | 14 |
| 10 | 10 | New Samaritan Corporation* | CT | 2,208 | 46 |
| 11 | 11 | CARING Housing Ministries* | CA | 2,127 | 9 |
| 12 | 12 | United Church Homes | OH | 2,070 | 49 |
| 13 | 13 | Westminster Communities of Florida | FL | 2,032 | 10 |
| 14 | 14 | Christopher Homes | LA | 1,860 | 13 |
| 15 | 15 | Community Housing Management Services* | CA | 1,807 | 16 |
| 16 | 16 | Springpoint Senior Living | NJ | 1,712 | 17 |
| 17 | 17 | Cornerstone Affiliates | CA | 1,701 | 22 |
| 18 | 18 | Salvation Army Silvercrest Management of California | CA | 1,678 | 19 |
| 19 | 19 | be.group | CA | 1,657 | 25 |
| 20 | 20 | Catholic Charities - Archdiocese of Baltimore | MD | 1,611 | 21 |
| 21 | 21 | Satellite Housing* | CA | 1,586 | 23 |
| 22 | 22 | Oklahoma City Housing Authority | OK | 1,386 | 10 |
| 23 | 23 | Catholic Charities of Chicago | IL | 1,372 | 18 |
| 24 | 28 | Victory Housing | MD | 1,347 | 16 |
| 25 | 24 | Presbyterian Villages of Michigan | MI | 1,326 | 17 |

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

* No 2013 response provided

6-2 2013 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

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

| 2013 Rank | 2012 Rank | System Name | State | Units | Communities ^Δ |
|-----------|-----------|--|-------|-------|--------------------------|
| 26 | 25 | Evangelical Lutheran Good Samaritan Society | SD | 1,203 | 28 |
| 27 | 26 | Jewish Community Housing for the Elderly | MA | 1,200 | 7 |
| 28 | 27 | Lutheran Social Services of Illinois | IL | 1,166 | 15 |
| 29 | 29 | Presby's Inspired Life | PA | 1,133 | 13 |
| 30 | 30 | Pacific Retirement Services, Inc. | OR | 1,105 | 24 |
| 31 | 31 | Wesley Senior Ministries | TN | 1,088 | 16 |
| 32 | 32 | Presbyterian SeniorCare | PA | 970 | 22 |
| 33 | 33 | LSC Service Corporation | OH | 916 | 5 |
| 34 | 34 | Union Labor Retirement Association* | OR | 884 | 6 |
| 35 | 35 | Lutheran Social Services of Central Ohio | OH | 880 | 19 |
| 36 | 36 | Wesley Woods Senior Living | GA | 874 | 4 |
| 37 | 37 | Selfhelp Community Services | NY | 864 | 5 |
| 38 | 38 | Hebrew Senior Life | MA | 766 | 2 |
| 39 | 39 | Christian Care Communities | KY | 743 | 10 |
| 40 | 40 | Avesta Housing* | ME | 742 | 34 |
| 41 | 41 | DePaul Housing Management Corporation | NY | 704 | 14 |
| 42 | 42 | Episcopal Senior Communities | CA | 676 | 4 |
| 43 | 44 | Lutheran Homes Society/ Lutheran Housing Services | OH | 651 | 11 |
| 44 | 45 | Aging True* | FL | 637 | 4 |
| 45 | 46 | St. Andrew's Resources for Seniors (STARS) | MO | 604 | 13 |
| 46 | 47 | Northern California Presbyterian Homes and Services | CA | 600 | 3 |
| 47 | 48 | Jewish Senior Life of Metropolitan Detroit* | MI | 538 | 0 |
| 48 | 51 | Lesley Senior Communities* | CA | 534 | 5 |
| 49 | 43 | Christian Concern Management and Development Corporation | PA | 515 | 6 |
| 50 | 49 | Ecumen | MN | 501 | 4 |

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

* No 2013 response provided

6-2 2013 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

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

| 2013 Rank | 2012 Rank | System Name | State | Units | Communities ^Δ |
|-----------|-----------|---|-------|-------|--------------------------|
| 51 | 50 | Lutheran Social Ministries of New Jersey | NJ | 498 | 7 |
| 52 | 52 | Jewish Home Lifecare | NY | 482 | 5 |
| 53 | 72 | Plano Community Home, Inc. | TX | 469 | 7 |
| 54 | 53 | Presbyterian Homes of Georgia* | GA | 465 | 2 |
| 55 | 54 | CJE SeniorLife | IL | 455 | 6 |
| 56 | 55 | Presbyterian Senior Living | PA | 414 | 6 |
| 57 | 56 | Lutheran Senior Services | MO | 392 | 6 |
| 58 | 57 | The Wartburg Adult Care Community | NY | 371 | 5 |
| 59 | 58 | Jewish Community Housing Corporation | NJ | 369 | 3 |
| 60 | 59 | Bethany Community Services | MA | 364 | 3 |
| 61 | 60 | Phoebe Ministries | PA | 356 | 8 |
| 62 | 61 | Greencroft | IN | 352 | 2 |
| 63 | 62 | Lutheran Social Services of Michigan | MI | 338 | 5 |
| 64 | 64 | Diakon Lutheran Social Ministries | PA | 335 | 3 |
| 65 | 63 | Goodwill Industries Suncoast* | FL | 335 | 5 |
| 66 | 65 | Lincoln Lutheran | WI | 335 | 2 |
| 67 | 66 | Family Housing Management Company | FL | 326 | 4 |
| 68 | 67 | Spokane Baptist Association Homes* | WA | 321 | 2 |
| 69 | 68 | Methodist Retirement Communities, The Woodlands | TX | 319 | 1 |
| 70 | 69 | Episcopal Retirement Homes Inc. - Cincinnati | OH | 318 | 3 |
| 71 | 70 | Mississippi Methodist Senior Services | MS | 313 | 0 |
| 72 | 71 | United Methodist Homes of New Jersey | NJ | 300 | 5 |
| 73 | 73 | Presbyterian Homes and Services | MN | 293 | 3 |
| 74 | 74 | National Caucus and Center on Black Aged, The * | MD | 278 | 3 |
| 75 | 75 | Elderly Housing Management Corporation* | FL | 272 | 2 |

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

* No 2013 response provided

6-2 2013 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

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

| 2013 Rank | 2012 Rank | System Name | State | Units | Communities ^Δ |
|-----------|-----------|--|-------|-------|--------------------------|
| 76 | 76 | Porter Hills Retirement Communities & Services | MI | 270 | 6 |
| 77 | 77 | Santa Clara Methodist Retirement Foundation* | CA | 257 | 2 |
| 78 | 78 | Christian Care Companies | AZ | 247 | 1 |
| 79 | 79 | Maple Knoll Communities | OH | 244 | 2 |
| 80 | 80 | Sholom Community Alliance* | MN | 241 | 3 |
| 81 | 81 | Lutheran Homes of Oshkosh* | WI | 219 | 3 |
| 82 | 82 | Older American Housing in Spotswood* | NJ | 200 | 2 |
| 83 | 83 | BHI Senior Living | IN | 198 | 0 |
| 84 | 84 | Saint Elizabeth Community* | RI | 197 | 1 |
| 85 | 85 | Lutheran Social Services Group* | NY | 196 | 6 |
| 86 | 86 | Augustana Care Corporation | MN | 188 | 0 |
| 87 | 87 | Evangelical Homes of Michigan | MI | 178 | 3 |
| 88 | 88 | Jewish Senior Housing & Healthcare | NJ | 178 | 2 |
| 89 | 89 | Guardian Angels of Elk River* | MN | 177 | 5 |
| 90 | 90 | Milton Residences for the Elderly* | MA | 167 | 0 |
| 91 | 91 | Moravian Care Ministries | MN | 167 | 0 |
| 92 | 92 | Eaton Senior Communities (fka Eaton Senior Programs (ESP)) | CO | 162 | 1 |
| 93 | 93 | Wesley Enhanced Living* | PA | 162 | 3 |
| 94 | 94 | Lutheran Homes of Michigan | MI | 161 | 0 |
| 95 | 96 | Ohio Presbyterian Retirement Services | OH | 150 | 0 |
| 96 | 95 | United Church Homes & Services | NC | 150 | 5 |
| 97 | 98 | Asbury Communities | MD | 149 | 1 |
| 98 | 97 | Sears Methodist Retirement System, Inc. | TX | 149 | 2 |
| 99 | 99 | Presbyterian Homes & Services | NY | 148 | 0 |
| 100 | 100 | Walker Methodist | MN | 139 | 3 |

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

* No 2013 response provided

6-3 2013 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

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

| Rank | 2013 LZ 100 Rank | System Name | State | Units (as of 12/31/12) | | | | |
|------|---------------------|---|-------|---------------------------|--------|-------|--------|--------|
| | | | | Total | ILU | ALU | NCB | AFF |
| 1 | 1 | Evangelical Lutheran Good Samaritan Society | SD | 19,665 | 4,984 | 2,170 | 11,308 | 1,203 |
| 2 | 31 | National Church Residences | OH | 17,965 | 705 | 446 | 540 | 16,274 |
| 3 | 2 | National Senior Campuses | MD | 17,324 | 15,280 | 917 | 1,127 | 0 |
| 4 | 6 | Retirement Housing Foundation | CA | 14,204 | 2,639 | 878 | 595 | 10,092 |
| 5 | 19 | Volunteers of America | VA | 12,336 | 482 | 707 | 1,343 | 9,804 |
| 6 | 3 | ACTS Retirement-Life Communities, Inc. | PA | 8,069 | 5,759 | 877 | 1,433 | 0 |
| 7 | 4 | Presbyterian Homes and Services | MN | 6,879 | 3,294 | 1,940 | 1,348 | 297 |
| 8 | 9 | Westminster Communities of Florida | FL | 5,331 | 2,088 | 460 | 751 | 2,032 |
| 9 | 13 | Cornerstone Affiliates | CA | 4,671 | 1,766 | 484 | 720 | 1,701 |
| 10 | 5 | Covenant Retirement Communities | IL | 4,612 | 3,087 | 720 | 805 | 0 |
| 11 | 7 | Lifespace Communities, Inc. | IA | 4,085 | 3,104 | 154 | 827 | 0 |
| 12 | 14 | Pacific Retirement Services, Inc. | OR | 3,919 | 2,092 | 344 | 388 | 1,095 |
| 13 | 10 | Lutheran Senior Services | MO | 3,669 | 1,661 | 709 | 907 | 392 |
| 14 | 11 | Presbyterian Senior Living | PA | 3,590 | 1,425 | 499 | 1,252 | 414 |
| 15 | 8 | The Kendal Corporation | PA | 3,389 | 2,508 | 433 | 448 | 0 |
| 16 | 35 | Springpoint Senior Living | NJ | 3,313 | 1,180 | 164 | 257 | 1,712 |
| 17 | 43 | be.group | CA | 3,189 | 851 | 390 | 232 | 1,716 |
| 18 | 12 | Ohio Presbyterian Retirement Services | OH | 3,184 | 1,723 | 515 | 796 | 150 |
| 19 | 76 | United Church Homes | OH | 3,047 | 177 | 136 | 664 | 2,070 |
| 20 | 18 | Ecumen | MN | 3,046 | 288 | 1,451 | 806 | 501 |
| 21 | 15 | Asbury Communities | MD | 2,924 | 1,943 | 334 | 498 | 149 |
| 22 | 21 | Diakon Lutheran Social Ministries | PA | 2,784 | 901 | 576 | 972 | 335 |
| 23 | 16 | Christian Homes, Inc. | IL | 2,727 | 676 | 280 | 1,750 | 21 |
| 24 | 17 | Front Porch | CA | 2,651 | 1,571 | 441 | 539 | 100 |
| 25 | 20 | Presbyterian Manors of Mid-America | KS | 2,499 | 888 | 555 | 1,056 | 0 |

LeadingAge



Ziegler

6-3 2013 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

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

| Rank | 2013 LZ 100 Rank | System Name | State | Units (as of 12/31/12) | | | | |
|------|------------------|---|-------|------------------------|-------|-------|-------|-------|
| | | | | Total | ILU | ALU | NCB | AFF |
| 26 | 69 | Presbyterian Villages of Michigan | MI | 2,378 | 588 | 286 | 178 | 1,326 |
| 27 | 37 | Hebrew SeniorLife | MA | 2,359 | 660 | 119 | 814 | 766 |
| 28 | 22 | Masonic Villages | PA | 2,325 | 1,397 | 259 | 669 | 0 |
| 29 | 27 | Augustana Care Corporation | MN | 2,167 | 80 | 1,035 | 781 | 271 |
| 30 | 41 | Episcopal Senior Communities | CA | 2,126 | 1,024 | 105 | 376 | 621 |
| 31 | 79 | Presby's Inspired Life | PA | 2,080 | 469 | 218 | 260 | 1,133 |
| 32 | 25 | Providence Life Services | IL | 2,060 | 808 | 472 | 699 | 81 |
| 33 | 26 | Franciscan Communities | IL | 2,051 | 751 | 385 | 776 | 139 |
| 34 | 23 | Shell Point | FL | 2,042 | 1,337 | 377 | 328 | 0 |
| 35 | 67 | Presbyterian SeniorCare | PA | 2,035 | 359 | 285 | 421 | 970 |
| 36 | 29 | Christian Care Companies | AZ | 2,033 | 1,434 | 284 | 68 | 247 |
| 37 | 24 | Willow Valley Retirement Communities | PA | 1,997 | 1,501 | 219 | 277 | 0 |
| 38 | **NR | Lutheran Social Services of Illinois | IL | 1,868 | 159 | 87 | 210 | 1,412 |
| 39 | 45 | Greencroft | IN | 1,803 | 530 | 388 | 533 | 352 |
| 40 | 28 | Otterbein Senior Lifestyle Choices | OH | 1,797 | 744 | 350 | 703 | 0 |
| 41 | 30 | Concordia Lutheran Ministries | PA | 1,745 | 554 | 901 | 290 | 0 |
| 42 | 36 | Loretto (Catholic Charities, Diocese of Syracuse) | NY | 1,735 | 259 | 628 | 714 | 134 |
| 43 | 49 | Mississippi Methodist Senior Services | MS | 1,703 | 805 | 265 | 320 | 313 |
| 44 | 33 | Elim Care | MN | 1,686 | 190 | 441 | 1,007 | 48 |
| 45 | 32 | The Eddy | NY | 1,673 | 502 | 313 | 858 | 0 |
| 46 | 39 | Eskaton | CA | 1,644 | 530 | 608 | 426 | 80 |
| 47 | 34 | Homewood Retirement Centers | MD | 1,631 | 907 | 273 | 451 | 0 |
| 48 | 42 | Magnolia Manor, Inc.* | GA | 1,627 | 339 | 335 | 809 | 144 |
| 49 | 38 | Senior Quality Lifestyles Corporation | TX | 1,587 | 989 | 337 | 261 | 0 |
| 50 | 57 | Phoebe Ministries | PA | 1,574 | 380 | 171 | 667 | 356 |

* No 2013 response provided

** NR: No Rank. Not in the 2012 LZ 100 Primary Ranking

6-3 2013 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

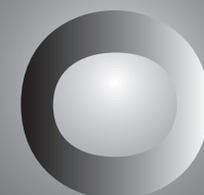
6-3 RANKED BY TOTAL MARKET-RATE AND AFFORDABLE SENIOR LIVING UNITS

| Rank | 2013 LZ 100 Rank | System Name | State | Units (as of 12/31/12) | | | | |
|------|------------------|---|-------|---------------------------|-----|-------|-------|-----|
| | | | | Total | ILU | ALU | NCB | AFF |
| 51 | 46 | Presbyterian Homes | IL | 1,555 | 859 | 224 | 363 | 109 |
| 52 | 40 | Bethesda Health Group, Inc.* | MO | 1,522 | 627 | 34 | 861 | 0 |
| 53 | 66 | Northern California Presbyterian Homes and Services | CA | 1,507 | 826 | 122 | 141 | 418 |
| 54 | **NR | Christian Care Communities | KY | 1,499 | 185 | 103 | 468 | 743 |
| 55 | 48 | Catholic Health Care Services of the Archdiocese of Philadelphia* | PA | 1,485 | 60 | 135 | 1,215 | 75 |
| 56 | 44 | Buckner Retirement Services, Inc. | TX | 1,471 | 870 | 315 | 286 | 0 |
| 57 | 47 | Holland Home | MI | 1,419 | 723 | 435 | 261 | 0 |
| 58 | 50 | WesleyLife | IA | 1,330 | 695 | 261 | 374 | 0 |
| 59 | 72 | United Methodist Homes of New Jersey | NJ | 1,328 | 88 | 688 | 252 | 300 |
| 60 | 52 | Lutheran Services for the Aging | NC | 1,324 | 257 | 285 | 732 | 50 |
| 61 | **NR | Lutheran Social Ministries of New Jersey | NJ | 1,321 | 281 | 125 | 267 | 648 |
| 62 | **NR | Lutheran Homes Society* | OH | 1,303 | 154 | 159 | 393 | 597 |
| 63 | 60 | American Baptist Homes of the Midwest* | MN | 1,290 | 374 | 209 | 617 | 90 |
| 64 | 51 | Baptist Village Retirement Communities of Oklahoma | OK | 1,276 | 770 | 181 | 325 | 0 |
| 65 | 53 | Masonicare | CT | 1,266 | 458 | 272 | 536 | 0 |
| 66 | 63 | Lutheran Social Services of South Central Pennsylvania | PA | 1,257 | 555 | 251 | 344 | 107 |
| 67 | 54 | Lutheran Life Communities | IL | 1,256 | 233 | 283 | 740 | 0 |
| 68 | 55 | Bethesda Senior Living Communities | CO | 1,250 | 204 | 1,046 | 0 | 0 |
| 69 | 64 | Sears Methodist Retirement System, Inc. | TX | 1,246 | 529 | 136 | 432 | 149 |
| 70 | 56 | Friendship Senior Options | IL | 1,239 | 806 | 185 | 248 | 0 |
| 71 | 61 | Lutheran SeniorLife | PA | 1,213 | 373 | 327 | 458 | 55 |
| 72 | 58 | Virginia Baptist Homes | VA | 1,211 | 764 | 227 | 220 | 0 |
| 73 | 59 | Virginia United Methodist Homes, Inc. | VA | 1,209 | 628 | 324 | 257 | 0 |
| 74 | **NR | Wesley Woods Senior Living | GA | 1,191 | 209 | 85 | 23 | 874 |
| 75 | **NR | Lutheran Social Services of Central Ohio | OH | 1,179 | 126 | 48 | 125 | 880 |

* No 2013 response provided

** NR: No Rank. Not in the 2012 LZ 100 Primary Ranking

LeadingAge



Ziegler

6-3 2013 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

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

| Rank | 2013 LZ 100 Rank | System Name | State | Units (as of 12/31/12) | | | | |
|------|------------------|---|-------|------------------------|-----|-----|-----|-----|
| | | | | Total | ILU | ALU | NCB | AFF |
| 76 | 73 | Wesley Enhanced Living | PA | 1,178 | 502 | 214 | 300 | 162 |
| 77 | 71 | Walker Methodist | MN | 1,173 | 493 | 165 | 376 | 139 |
| 78 | 62 | EMA, Inc. | MD | 1,156 | 651 | 228 | 277 | 0 |
| 79 | **NR | Lutheran Social Services of Michigan | MI | 1,120 | 286 | 120 | 376 | 338 |
| 80 | 80 | United Church Homes & Services | NC | 1,094 | 526 | 90 | 328 | 150 |
| 81 | 65 | Los Angeles Jewish Home for the Aged * | CA | 1,092 | 159 | 423 | 510 | 0 |
| 82 | **NR | Methodist Retirement Communities and Affiliates | TX | 1,086 | 319 | 234 | 214 | 319 |
| 83 | 68 | United Methodist Homes | NY | 1,059 | 395 | 238 | 426 | 0 |
| 84 | 70 | Lutheran Homes of South Carolina | SC | 1,038 | 386 | 328 | 324 | 0 |
| 85 | 74 | Air Force Villages | TX | 1,013 | 748 | 129 | 136 | 0 |
| 86 | **NR | Presbyterian Homes of Georgia* | GA | 1,003 | 154 | 89 | 295 | 465 |
| 87 | 97 | Givens Estates Retirement Community | NC | 998 | 599 | 91 | 130 | 178 |
| 88 | 75 | Elant | NY | 995 | 148 | 144 | 703 | 0 |
| 89 | 77 | SantaFe Senior Living | FL | 976 | 731 | 185 | 60 | 0 |
| 90 | **NR | Lutheran Homes of Michigan | MI | 967 | 128 | 224 | 384 | 231 |
| 91 | 81 | United Methodist Retirement Homes, Inc. | NC | 961 | 630 | 101 | 206 | 24 |
| 92 | 78 | The Presbyterian Homes, Inc. of North Carolina | NC | 958 | 634 | 133 | 189 | 2 |
| 93 | 93 | Living Branches | PA | 952 | 463 | 246 | 143 | 100 |
| 94 | **NR | Maple Knoll Communities | OH | 941 | 369 | 91 | 237 | 244 |
| 95 | 92 | Simpson Senior Services | PA | 939 | 494 | 172 | 192 | 81 |
| 96 | **NR | BHI Senior Living* | IN | 933 | 134 | 376 | 225 | 198 |
| 97 | 82 | Menno Haven | PA | 920 | 531 | 177 | 212 | 0 |
| 98 | **NR | Jewish Senior Life of Metropolitan Detroit* | MI | 917 | 246 | 133 | 0 | 538 |
| 99 | 83 | United Methodist Memorial Home | IN | 917 | 189 | 469 | 259 | 0 |
| 100 | 86 | Oakwood Lutheran Senior Ministries | WI | 915 | 588 | 160 | 137 | 30 |

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

* No 2013 response provided

** NR: No Rank. Not in the 2012 LZ 100 Primary Ranking

LZ 100 Charts

Chapter 3

The Rankings

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Chapter 4

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Chapter 5

Growth

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