

# 2014 LeadingAge 150 Ziegler



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

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

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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:



The mission of LeadingAge is to expand the world of possibilities for aging. Our membership touches 4

million lives every day and includes 6,000 not-for-profit organizations representing the entire field of aging services, 39 state partners, hundreds of businesses, consumer groups, foundations and research partners. LeadingAge is also a part of the International Association of Homes and Services for the Ageing, whose membership spans 30 countries. LeadingAge is a 501(c)(3) tax-exempt charitable organization focused on education, advocacy and applied research.

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Ziegler is one of the nation's leading underwriters of financing for not-for-profit

senior living providers. Ziegler offers creative, tailored solutions to its senior living clientele, including investment banking, financial risk management, merger and acquisition services, investment management, seed capital, FHA/HUD, capital and strategic planning, sponsorship transitions, as well as senior living research, education and communication.

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**LeadingAge Ziegler 150. The nation's largest not-for-profit multi-site senior living organizations.**

**ISBN 1-930599-13-7**

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The 2014 LeadingAge Ziegler 150 confirms, once again, the significant role that LeadingAge member not-for-profit organizations play in the aging services field. This report, like the ten LZ 100 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 report has expanded over time 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 2014, 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 150 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 150 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 150, eleventh edition.

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

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

LeadingAge



We are excited to once again be a part of the LeadingAge Ziegler publication, compiling data from the largest not-for-profit senior living providers in the country. As we continue to partner with LeadingAge on this publication, we strive to expand upon new areas of research. This year's publication continues to include the core sections with the number of units and communities, but has also been expanded to reveal trends in home and-community-based services, technology adoption, joint ventures, and future growth plans to name a few. In what ways are providers growing and evolving and at what pace? How does the past differ from the future growth initiatives being undertaken? How are external forces, such as health care reform and technological innovation, shaping our not-for-profit sector?

To answer these and a host of other questions, Ziegler began its research more than a decade ago. 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. 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.

This year, the publication's 11th annual release, marks an additional milestone for the report. The number of organizations profiled in this year's report has been expanded from 100 to the largest 150 not-for-profit organizations. Collectively, the country's 150 largest not-for-profit senior living providers represent over 235,000 units throughout the country. That is a significant service to this country's senior population, and it has been a privilege tracking the growth of the sector over the past 11 years.

Because LeadingAge's membership is exclusively not-for-profit senior living providers, LeadingAge has been the ideal partner for this research initiative. 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 LeadingAge Ziegler 150 ("LZ 150") 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

# Leading Age 150 Ziegler

## The LeadingAge Ziegler 150 Objective

Both LeadingAge and Ziegler are nationally recognized organizations serving the growing aging services field. The LeadingAge Ziegler 150 (“LZ 150”) 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 150, we hope to further the understanding and delivery of successful senior living.

The 2014 LeadingAge Ziegler 150 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, 2013**.

# LeadingAge 150 Ziegler

# Chapter 1

## Understanding the LeadingAge Ziegler 150

### Importance of Not-for-Profits

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

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

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 serve older adults. 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 providers have found (whether independent living, assisted living, nursing care or home and community-based services).

Many not-for-profit providers have risen from modest beginnings more than a century ago to become vital community resources today. In the LeadingAge Ziegler 150 rankings, there are 47 organizations that were founded more than 100 years ago! These organizations continue to build legacies of caring, giving and selflessness while expanding their capabilities and honing their skills, striving to provide service for generations to come.

## The LZ 150 Development

The LZ 150 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 living<sup>1</sup>. Joining together to prepare and present the data, LeadingAge and Ziegler founded the LeadingAge Ziegler 100, which this year has evolved to become the LeadingAge Ziegler 150. The combined expertise of LeadingAge and Ziegler yields a reliable, useful and valuable source of information.

### **The LeadingAge Ziegler 150 (LZ 150)**

The genesis of the LZ 150 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, such as who are the largest senior living providers in the nation, how quickly are systems growing, and what trends are taking place with the type of growth.

By assembling and presenting the combined data and knowledge of LeadingAge and Ziegler, the LZ 150 publication answers many of these questions. From its inception, the creation of the LZ 150 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 150 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 150 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 150 is only the beginning of a profile of providers who are delivering services to the senior 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.

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<sup>1</sup> 2013 ranking data and amounts provided by Thomson Reuters as of 1/2/14.

## Chapter 2

### The Largest 150

#### A Quantitative Listing

LeadingAge and Ziegler are not the first to develop a listing of organizations or companies. Many common listings include qualitative factors, such as “best” or “worst” or “most successful.” Other listings are based on quantitative, objective measures alone. Following the footsteps of other well-known listings, the LZ 150 also uses a quantitative means of listing. The LZ 150 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 150 as a statement of fact, not as an endorsement.

## Methodology

### Defining a Multi-site Organization

For the purposes of the LZ 150 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 150 **Primary Ranking**. However, as before, we offer an examination of the extent to which the LZ 150 organizations manage units they do not own (Chapter 4: Organizational Characteristics).

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 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 150 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).

### Compiling the Listing

The LeadingAge Directory of Members was a critical source in compiling the first ranking in the 2004 publication. Using the list of multi-community sponsors in the directory, Ziegler compiled a listing of providers and ordered the organizations on the list by each organization's number of total senior living units (excluding government-subsidized (affordable) housing units, which are, as mentioned earlier, ranked in a list of their own later in this publication).

For each organization, Ziegler attempted to trace 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 2014 LZ 150 were provided and confirmed (“confirmation”) by 132 of the 150 organizations. Twenty-five (25) confirmations were received from the “next 50,” the organizations ranked from 151 to 200.

Although the information used for the compilation of the LZ 150 was provided in the vast majority of cases by the organizations themselves, some organizations cannot trace their histories to the degree of accuracy desired for the LZ 150 analyses. In 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

2013 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 150'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 18,286 units to 550 units.
- **Information on unit mix ...** The 10 largest providers of senior living represent approximately 32% of the total number of units for all systems in LZ 150.
- **An appreciation of the rate of growth ...** In the last ten years the average annual growth rate in total units is 2.2%, with independent living and assisted living growth each year, but decline in the number of nursing care beds. Memory care units are becoming an increasingly important component of the annual unit counts, with nearly 75% of the LZ 150 offering specialized memory care units.
- **Insights into type of growth ...** The LZ 150 have grown primarily through expansion, with the number of units via new campus growth having slowed in the past few years since the economic recession. The majority of growth in recent years has been from within existing campuses. At the same time, organizations continue to dispose of dated nursing homes or financially stressed communities.
- **Home and community-based services ...** Growth is also taking place in the form of home-based services, such as home health, continuing care at home (CCaH) programs or PACE (Program for All-Inclusive Care for the Elderly). Gaining in popularity is the CCaH model, which is now offered by roughly 12% of the LZ 150. Future growth plans are high for this type of program, with nearly 34% of providers stating potential expansion in the next two years.
- **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.
- **Technology ...** On average, roughly 77% of the communities owned by the LZ 150 use electronic point of care/point of service documentation systems. A similar percentage, 74.7% use electronic health/medical records. Adoption is generally lower for health and wellness technologies, such as medication monitoring or telehealth remote monitoring.
- **Joint Ventures and Partnerships ...** Roughly one-quarter of LZ 150 organizations are engaged in a formal joint venture, most commonly with another provider, a health system or a home health/home care agency. Nearly 25% are engaged in a formal health care reform contract, with 13 providers reporting being part of an Accountable Care Organization (ACO) network.

# LeadingAge 150 Ziegler

## Chapter 3

### Rankings

#### The LZ 150 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 150 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 150 is by total senior living units with the 2014 and 2013 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 2014 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations.

**The 2014 Rank.** The 2014 Rank column displays the numerical ranking of each system according to its 12/31/13 data within the LZ 150 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 2013 Rank.** The 2013 Rank shows the numerical ranking of the listed organization in last year’s publication (according to its 12/31/12 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 2013. Also note that with the increase to the largest 150 in the 2014 publication, the “next 25” connotes a different meaning than in previous years. The “next 50” in the current publication represent organizations ranked 151 through 200 as of 12/31/2013.

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

**State.** This field notes the location of the system’s corporate headquarters. For example, 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 12/31/13).** The systems listed in the 2014 LZ 150 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/13. Managed communities that are not owned will be discussed later in the publication (Chapter 4) and are not included in the total community count compiled in the LZ 150 **Primary Ranking**. Government-subsidized (affordable housing) units are also excluded from this count, but are presented for each of the LZ 150 organizations in subsequent listings (Chapter 6).

**Total.** The Total column is the sum of the units listed in each of the three different levels of care (described in more detail below). This total is the variable by which the LZ 150 is ranked for the **Primary Ranking**.

**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 150.) 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 150 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.*

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 150 have CCRCs within their portfolios; however, for purposes of unit rankings, the units within CCRCs are counted by level of care.

**Communities (as of 12/31/13).** Over the years a number of terms have been used to describe a senior living property: site, location, facility, campus, community. A high rise on a limited acreage parcel doesn't fit the term "campus". A scattering of buildings, offering various levels of care, across extended acreage doesn't fit the term "facility". We believe the best all-encompassing word to use is "community". The communities examined are continuing care retirement communities (CCRC), independent living communities (IL), assisted living communities (AL), and nursing homes (NH). It is important to note that a single CCRC may include ILU (independent living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will generally contain at least independent living and nursing care<sup>2</sup>. 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 150 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 150 stops at the 150th 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.

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<sup>2</sup> 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 150 research.

## 3-1 2014 LeadingAge Ziegler 150

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

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

2014 Rank	2013 Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,286	4,936	2,194	11,156	173	77	8	35	53
2	2	National Senior Campuses	MD	17,682	15,247	1,173	1,262	15	15	0	0	0
3	3	ACTS Retirement Services, Inc.	PA	8,051	5,711	907	1,433	23	23	0	0	0
4	4	Presbyterian Homes and Services	MN	6,782	3,339	2,065	1,378	37	12	21	2	2
5	5	Covenant Retirement Communities, Inc.	IL	4,703	3,110	758	835	15	13	1	1	0
6	6	Retirement Housing Foundation	CA	4,104	2,636	873	595	18	9	8	1	0
7	7	Lifespace Communities, Inc.	IA	4,072	3,093	154	825	12	12	0	0	0
8	8	The Kendal Corporation	PA	3,727	2,554	617	556	15	13	2	0	0
9	10	Lutheran Senior Services	MO	3,359	1,669	710	980	11	9	0	1	1
10	9	Westminster Communities of Florida	FL	3,312	2,106	455	751	9	9	0	0	0
11	11	Presbyterian Senior Living	PA	3,176	1,425	499	1,252	20	12	5	2	1
12	12	Ohio Presbyterian Retirement Services	OH	3,022	1,669	557	796	11	11	0	0	0
13	13	Cornerstone Affiliates	CA	2,960	1,735	368	857	11	11	0	0	0
14	17	Front Porch Communities and Services	CA	2,835	1,816	481	538	10	5	5	0	0
15	14	Pacific Retirement Services	OR	2,824	2,092	344	388	9	8	1	0	0
16	15	Asbury Communities	MD	2,773	1,941	334	498	5	5	0	0	0
17	16	Christian Homes, Inc.	IL	2,508	544	283	1,681	13	13	0	0	0
18	20	Presbyterian Manors of Mid-America, Inc.	KS	2,375	840	547	988	18	16	0	1	1
19	18	Ecumen	MN	2,371	288	1,447	636	36	0	4	24	8
20	22	Masonic Villages	PA	2,347	1,419	259	669	5	3	1	1	0
21	19	Volunteers of America	VA	2,335	480	707	1,148	24	4	3	7	10
22	21	Diakon Lutheran Social Ministries	PA	2,261	940	490	831	9	9	0	0	0
23	23	Shell Point	FL	2,037	1,332	377	328	2	2	0	0	0
24	24	Willow Valley Communities	PA	2,026	1,530	219	277	3	3	0	0	0
25	35	Springpoint Senior Living, Inc.	NJ	1,981	1,445	279	257	6	6	0	0	0

### 3-1 2014 LeadingAge Ziegler 150

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

#### 3-1a RANKED BY TOTAL SENIOR LIVING UNITS

#### PRIMARY RANKING

2014 Rank	2013 Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	26	Franciscan Communities, Inc.	IL	1,912	751	385	776	8	4	1	3	0
27	27	Augustana Care	MN	1,901	0	1,120	781	18	0	0	12	6
28	28	Otterbein Senior Lifestyle Choices	OH	1,797	744	350	703	10	5	0	0	5
29	29	Christian Care Companies	AZ	1,789	1,434	289	66	4	1	3	0	0
30	38	Senior Quality Lifestyles Corporation	TX	1,782	1,054	419	309	6	6	0	0	0
31	30	Concordia Lutheran Ministries	PA	1,728	554	878	296	10	4	0	6	0
32	NR	Jewish Home Lifecare	NY	1,651	21	0	1,630	4	0	1	0	3
33	34	Homewood Retirement Centers	MD	1,646	918	277	451	5	4	1	0	0
34	31	National Church Residences	OH	1,616	604	472	540	8	5	0	2	1
35	37	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
36	33	Elim Care, Inc.	MN	1,592	154	430	1,008	23	0	4	9	10
37	39	Eskaton	CA	1,565	533	606	426	13	1	3	6	3
38	25	Providence Life Services	IL	1,553	665	360	528	9	1	4	1	3
39	41	Episcopal Senior Communities	CA	1,488	1,013	99	376	6	6	0	0	0
40	42	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
41	36	Loretto	NY	1,475	259	593	623	8	1	2	4	1
42	44	Buckner Retirement Services, Inc.	TX	1,456	857	243	356	7	5	2	0	0
43	46	Presbyterian Homes	IL	1,446	859	224	363	5	3	1	1	0
44	49	Mississippi Methodist Senior Services, Inc.	MS	1,442	807	315	320	12	2	8	0	2
45	50	WesleyLife	IA	1,431	694	299	438	7	7	0	0	0
46	47	Holland Home	MI	1,419	723	455	241	4	3	0	0	1
47	48	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
48	45	Greencroft Communities	IN	1,406	517	390	499	6	6	0	0	0
49	40	Bethesda Health Group, Inc.	MO	1,369	549	18	802	7	1	4	0	2
50	55	Bethesda Senior Living Communities	CO	1,362	155	1,207	0	18	0	1	17	0

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

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

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

2014 Rank	2013 Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	43	be.group	CA	1,359	859	268	232	7	6	0	1	0
52	69	Presbyterian Villages of Michigan	MI	1,318	901	239	178	8	2	6	0	0
53	51	Baptist Village Communities	OK	1,280	774	181	325	8	3	5	0	0
54	54	Lutheran Life Communities	IL	1,279	233	299	747	5	5	0	0	0
55	53	Masonicare, Inc.	CT	1,266	458	272	536	8	1	3	2	2
56	52	Lutheran Services Carolinas	NC	1,262	257	273	732	8	1	1	1	5
57	56	Friendship Senior Options	IL	1,259	785	183	291	2	2	0	0	0
58	77	SantaFe Senior Living	FL	1,228	876	252	100	3	3	0	0	0
59	57	Phoebe Ministries	PA	1,216	378	171	667	4	4	0	0	0
60	59	Virginia United Methodist Homes, Inc.	VA	1,213	516	424	273	7	6	0	1	0
61	58	Virginia Baptist Homes	VA	1,204	760	225	219	4	4	0	0	0
62	60	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
63	61	Lutheran SeniorLife	PA	1,173	481	234	458	7	2	5	0	0
64	62	EMA	MD	1,156	651	228	277	4	3	0	1	0
65	63	Lutheran Social Services of South Central Pennsylvania	PA	1,138	553	251	334	6	6	0	0	0
66	67	Presbyterian SeniorCare	PA	1,114	348	351	415	3	3	0	0	0
67	64	Sears Methodist Retirement System, Inc.	TX	1,097	529	136	432	6	5	0	0	1
68	66	Northern California Presbyterian Homes and Services, Inc.	CA	1,088	824	123	141	5	3	1	1	0
69	68	United Methodist Homes	NY	1,061	394	241	426	4	3	0	1	0
70	71	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
71	70	Lutheran Homes of South Carolina	SC	1,029	386	327	316	5	5	0	0	0
72	72	United Methodist Homes of New Jersey	NJ	1,026	88	686	252	5	1	0	4	0
73	73	Wesley Enhanced Living	PA	1,022	501	221	300	6	5	1	0	0
74	75	Elant	NY	995	148	144	703	6	1	0	1	4
75	74	Air Force Villages, Inc.	TX	993	728	129	136	2	2	0	0	0

### 3-1 2014 LeadingAge Ziegler 150

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

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

2014 Rank	2013 Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	76	United Church Homes, Inc.	OH	983	110	205	668	6	4	0	0	2
77	79	Presby's Inspired Life	PA	965	491	214	260	4	2	0	1	1
78	78	The Presbyterian Homes, Inc.	NC	958	636	133	189	3	3	0	0	0
79	80	United Church Homes and Services	NC	948	530	74	344	3	3	0	0	0
80	83	United Methodist Memorial Home	IN	946	199	472	275	3	3	0	0	0
81	81	The United Methodist Retirement Homes, Inc.	NC	933	626	105	202	3	3	0	0	0
82	82	Menno Haven	PA	920	531	177	212	3	2	1	0	0
83	84	Mather LifeWays	IL	900	623	46	231	4	2	1	0	1
84	87	Cedar Community	WI	895	425	241	229	6	1	2	2	1
85	Second 25	Liberty Lutheran Services	PA	893	384	301	208	4	3	0	1	0
86	85	VMP	WI	889	447	205	237	2	2	0	0	0
87	86	Oakwood Lutheran Senior Ministries	WI	885	588	160	137	2	2	0	0	0
88	89	Westminster Ingleside Retirement Communities	DC	877	607	124	146	3	3	0	0	0
89	91	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
90	90	Presbyterian Communities and Services	TX	856	329	139	388	2	2	0	0	0
91	93	Living Branches	PA	852	463	246	143	3	2	0	1	0
92	94	Presbyterian Communities of South Carolina	SC	850	270	314	266	5	5	0	0	0
93	92	Simpson Senior Services	PA	839	494	153	192	3	3	0	0	0
94	96	Goodwin House Incorporated	VA	832	585	99	148	2	2	0	0	0
95	65	Los Angeles Jewish Home	CA	831	50	271	510	3	2	0	0	1
96	Second 25	Sunset Retirement Communities and Services	MI	822	491	201	130	4	1	1	1	1
97	95	LutherCare	PA	810	473	126	211	3	2	0	0	1
98	97	Givens Estates	NC	802	581	77	144	2	2	0	0	0
99	100	Morningside Ministries	TX	789	318	135	336	3	3	0	0	0
100	First 25	Sunnyside Presbyterian Home, Inc.	VA	780	504	142	134	12	3	3	3	3

LeadingAge 150 Ziegler

## 3-1 2014 LeadingAge Ziegler 150

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

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

2014 Rank	2013 Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
101	99	Western Home Communities	IA	779	382	297	100	2	1	1	0	0
102	First 25	BHI Senior Living, Inc.	IN	769	147	397	225	3	3	0	0	0
103	First 25	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
104	First 25	Methodist Retirement Communities	TX	761	318	229	214	4	4	0	0	0
105	First 25	Lutheran Social Services of Michigan	MI	757	281	120	356	5	1	2	0	2
106	88	Christian Care Centers	TX	752	386	138	228	3	3	0	0	0
107	First 25	Life Enriching Communities	OH	751	458	134	159	2	2	0	0	0
108	First 25	Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
109	First 25	Christian Living Communities	CO	744	413	152	179	3	3	0	0	0
110	First 25	Eventide	MN	742	73	268	401	7	0	1	3	3
111	First 25	The Ohio Masonic Home	OH	738	343	201	194	3	2	1	0	0
112	First 25	Wellspring Lutheran Services	MI	736	128	224	384	10	1	3	2	4
113	First 25	Luther Manor	WI	732	366	156	210	2	1	0	1	0
114	First 25	Albright Care Services	PA	723	269	166	288	2	2	0	0	0
115	NR	Landis Communities	PA	718	471	144	103	3	1	1	0	1
116	First 25	Lutheran Homes Society	OH	706	142	171	393	5	2	1	0	2
117	First 25	Saint Therese	MN	693	302	69	322	3	2	0	1	0
118	First 25	Wesley Homes	WA	688	453	87	148	2	2	0	0	0
119	Second 25	Lutheran Life Villages	IN	684	154	127	403	3	1	0	0	2
120	Second 25	Masonic Homes of Kentucky	KY	680	302	125	253	3	1	1	1	0
121	First 25	Messiah Lifeways	PA	680	339	157	184	2	1	1	0	0
122	First 25	Crista Senior Living	WA	680	382	131	167	2	1	1	0	0
123	First 25	Lutheran Social Ministries of New Jersey	NJ	678	281	130	267	2	1	0	0	1
124	First 25	Maple Knoll Communities, Inc.	OH	676	368	90	218	2	2	0	0	0
125	First 25	Vincentian Collaborative System	PA	675	66	82	527	4	2	0	0	2

NR indicates that organization was not among largest 100 in the 2013 report

### 3-1 2014 LeadingAge Ziegler 150

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

#### 3-1a RANKED BY TOTAL SENIOR LIVING UNITS

#### PRIMARY RANKING

2014 Rank	2013 Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
126	First 25	LifeStream Complete Senior Living, Inc.	AZ	661	357	144	160	8	0	3	3	2
127	Second 25	United Methodist Homes	CT	659	90	406	163	6	1	0	3	2
128	Second 25	Church Homes inc.	CT	659	90	406	163	6	1	0	3	2
129	Nxt Nxt 50	National Lutheran Communities & Services	MD	656	397	89	170	3	2	0	1	0
130	First 25	Christian Care Communities, Inc.	KY	653	185	0	468	6	4	1	0	1
131	Second 25	LindenGrove, Inc.	WI	650	0	189	461	9	0	0	5	4
132	Second 25	Asbury Inc.	TN	635	177	126	332	3	2	0	0	1
133	Second 25	The Loomis Communities	MA	635	427	74	134	4	4	0	0	0
134	Second 25	Heritage Ministries	NY	624	156	68	400	8	0	3	2	3
135	Second 25	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
136	Second 25	Smith Senior Living	IL	615	325	144	146	2	2	0	0	0
137	Second 25	Presbyterian Retirement Communities Northwest	WA	591	397	132	62	3	3	0	0	0
138	Second 25	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
139	Second 25	Lutheran Social Services of the South, Inc.	TX	586	339	149	98	4	2	1	1	0
140	NR	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
141	Second 25	Mercy Community Health	CT	581	205	120	256	2	1	0	0	1
142	Second 25	Baptist Homes Society	PA	580	257	134	189	2	1	0	1	0
143	Second 25	Friends Homes, Inc.	NC	577	368	100	109	2	2	0	0	0
144	First 25	St. John's Lutheran Ministries	MT	576	144	246	186	4	3	0	1	0
145	Second 25	Porter Hills Retirement Communities and Services	MI	573	356	116	101	3	1	1	1	0
146	Nxt Nxt 50	United Methodist Retirement Communities, Inc.	MI	564	279	200	85	3	2	1	0	0
147	Second 25	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
148	Second 25	Baptist Life Communities	KY	560	218	75	267	4	1	2	0	1
149	Second 25	Medford Leas	NJ	552	410	75	67	2	1	1	0	0
150	Second 25	Life Care Pastoral Services	FL	550	384	76	90	2	2	0	0	0

Note: The 2013 report ranked only 100 largest systems whereby 2014 ranks the largest 150 systems

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations  
3-1b RANKED BY INDEPENDENT LIVING UNITS

2014 IL Rank	2013 IL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	National Senior Campuses	MD	17,682	15,247	1,173	1,262	15	15	0	0	0
2	2	ACTS Retirement Services, Inc.	PA	8,051	5,711	907	1,433	23	23	0	0	0
3	3	Evangelical Lutheran Good Samaritan Society	SD	18,286	4,936	2,194	11,156	173	77	8	35	53
4	4	Presbyterian Homes and Services	MN	6,782	3,339	2,065	1,378	37	12	21	2	2
5	6	Covenant Retirement Communities, Inc.	IL	4,703	3,110	758	835	15	13	1	1	0
6	5	Lifespace Communities, Inc.	IA	4,072	3,093	154	825	12	12	0	0	0
7	7	Retirement Housing Foundation	CA	4,104	2,636	873	595	18	9	8	1	0
8	8	The Kendal Corporation	PA	3,727	2,554	617	556	15	13	2	0	0
9	10	Westminster Communities of Florida	FL	3,312	2,106	455	751	9	9	0	0	0
10	9	Pacific Retirement Services	OR	2,824	2,092	344	388	9	8	1	0	0
11	11	Asbury Communities	MD	2,773	1,941	334	498	5	5	0	0	0
12	15	Front Porch Communities and Services	CA	2,835	1,816	481	538	10	5	5	0	0
13	12	Cornerstone Affiliates	CA	2,960	1,735	368	857	11	11	0	0	0
14	14	Lutheran Senior Services	MO	3,359	1,669	710	980	11	9	0	1	1
15	13	Ohio Presbyterian Retirement Services	OH	3,022	1,669	557	796	11	11	0	0	0
16	16	Willow Valley Communities	PA	2,026	1,530	219	277	3	3	0	0	0
17	21	Springpoint Senior Living, Inc.	NJ	1,981	1,445	279	257	6	6	0	0	0
18	17	Christian Care Companies	AZ	1,789	1,434	289	66	4	1	3	0	0
19	18	Presbyterian Senior Living	PA	3,176	1,425	499	1,252	20	12	5	2	1
20	19	Masonic Villages	PA	2,347	1,419	259	669	5	3	1	1	0
21	20	Shell Point	FL	2,037	1,332	377	328	2	2	0	0	0
22	23	Senior Quality Lifestyles Corporation	TX	1,782	1,054	419	309	6	6	0	0	0
23	22	Episcopal Senior Communities	CA	1,488	1,013	99	376	6	6	0	0	0
24	25	Diakon Lutheran Social Ministries	PA	2,261	940	490	831	9	9	0	0	0
25	24	Homewood Retirement Centers	MD	1,646	918	277	451	5	4	1	0	0

## 3-1 2014 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2014 IL Rank	2013 IL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	54	Presbyterian Villages of Michigan	MI	1,318	901	239	178	8	2	6	0	0
27	39	SantaFe Senior Living	FL	1,228	876	252	100	3	3	0	0	0
28	28	Presbyterian Homes	IL	1,446	859	224	363	5	3	1	1	0
29	29	be.group	CA	1,359	859	268	232	7	6	0	1	0
30	27	Buckner Retirement Services, Inc.	TX	1,456	857	243	356	7	5	2	0	0
31	26	Presbyterian Manors of Mid-America, Inc.	KS	2,375	840	547	988	18	16	0	1	1
32	30	Northern California Presbyterian Homes and Services, Inc.	CA	1,088	824	123	141	5	3	1	1	0
33	33	Mississippi Methodist Senior Services, Inc.	MS	1,442	807	315	320	12	2	8	0	2
34	32	Friendship Senior Options	IL	1,259	785	183	291	2	2	0	0	0
35	34	Baptist Village Communities	OK	1,280	774	181	325	8	3	5	0	0
36	35	Virginia Baptist Homes	VA	1,204	760	225	219	4	4	0	0	0
37	36	Franciscan Communities, Inc.	IL	1,912	751	385	776	8	4	1	3	0
38	38	Otterbein Senior Lifestyle Choices	OH	1,797	744	350	703	10	5	0	0	5
39	37	Air Force Villages, Inc.	TX	993	728	129	136	2	2	0	0	0
40	40	Holland Home	MI	1,419	723	455	241	4	3	0	0	1
41	42	WesleyLife	IA	1,431	694	299	438	7	7	0	0	0
42	31	Providence Life Services	IL	1,553	665	360	528	9	1	4	1	3
43	44	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
44	45	EMA	MD	1,156	651	228	277	4	3	0	1	0
45	46	The Presbyterian Homes, Inc.	NC	958	636	133	189	3	3	0	0	0
46	47	The United Methodist Retirement Homes, Inc.	NC	933	626	105	202	3	3	0	0	0
47	50	Mather LifeWays	IL	900	623	46	231	4	2	1	0	1
48	51	Westminster Ingleside Retirement Communities	DC	877	607	124	146	3	3	0	0	0
49	41	National Church Residences	OH	1,616	604	472	540	8	5	0	2	1
50	55	Oakwood Lutheran Senior Ministries	WI	885	588	160	137	2	2	0	0	0

LeadingAge 150 Ziegler

## 3-1 2014 LeadingAge Ziegler 150

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

### 3-1b RANKED BY INDEPENDENT LIVING UNITS

2014 IL Rank	2013 IL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	53	Goodwin House Incorporated	VA	832	585	99	148	2	2	0	0	0
52	52	Givens Estates	NC	802	581	77	144	2	2	0	0	0
53	57	Concordia Lutheran Ministries	PA	1,728	554	878	296	10	4	0	6	0
54	56	Lutheran Social Services of South Central Pennsylvania	PA	1,138	553	251	334	6	6	0	0	0
55	49	Bethesda Health Group, Inc.	MO	1,369	549	18	802	7	1	4	0	2
56	43	Christian Homes, Inc.	IL	2,508	544	283	1,681	13	13	0	0	0
57	NR	Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
58	59	Eskaton	CA	1,565	533	606	426	13	1	3	6	3
59	58	Menno Haven	PA	920	531	177	212	3	2	1	0	0
60	62	United Church Homes and Services	NC	948	530	74	344	3	3	0	0	0
61	61	Sears Methodist Retirement System, Inc.	TX	1,097	529	136	432	6	5	0	0	1
62	60	Greencroft Communities	IN	1,406	517	390	499	6	6	0	0	0
63	48	Virginia United Methodist Homes, Inc.	VA	1,213	516	424	273	7	6	0	1	0
64	NR	Sunnyside Presbyterian Home, Inc.	VA	780	504	142	134	12	3	3	3	3
65	64	Wesley Enhanced Living	PA	1,022	501	221	300	6	5	1	0	0
66	65	Simpson Senior Services	PA	839	494	153	192	3	3	0	0	0
67	66	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
68	69	Presby's Inspired Life	PA	965	491	214	260	4	2	0	1	1
69	NR	Sunset Retirement Communities and Services	MI	822	491	201	130	4	1	1	1	1
70	80	Lutheran SeniorLife	PA	1,173	481	234	458	7	2	5	0	0
71	68	Volunteers of America	VA	2,335	480	707	1,148	24	4	3	7	10
72	67	LutherCare	PA	810	473	126	211	3	2	0	0	1
73	NR	Landis Communities	PA	718	471	144	103	3	1	1	0	1
74	70	Living Branches	PA	852	463	246	143	3	2	0	1	0
75	72	Masonicare, Inc.	CT	1,266	458	272	536	8	1	3	2	2

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2014 IL Rank	2013 IL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	NR	Life Enriching Communities	OH	751	458	134	159	2	2	0	0	0
77	NR	Wesley Homes	WA	688	453	87	148	2	2	0	0	0
78	73	VMP	WI	889	447	205	237	2	2	0	0	0
79	NR	The Loomis Communities	MA	635	427	74	134	4	4	0	0	0
80	74	Cedar Community	WI	895	425	241	229	6	1	2	2	1
81	NR	Christian Living Communities	CO	744	413	152	179	3	3	0	0	0
82	NR	Medford Leas	NJ	552	410	75	67	2	1	1	0	0
83	NR	National Lutheran Communities & Services	MD	656	397	89	170	3	2	0	1	0
84	NR	Presbyterian Retirement Communities Northwest	WA	591	397	132	62	3	3	0	0	0
85	76	United Methodist Homes	NY	1,061	394	241	426	4	3	0	1	0
86	77	Lutheran Homes of South Carolina	SC	1,029	386	327	316	5	5	0	0	0
87	75	Christian Care Centers	TX	752	386	138	228	3	3	0	0	0
88	NR	Liberty Lutheran Services	PA	893	384	301	208	4	3	0	1	0
89	NR	Life Care Pastoral Services	FL	550	384	76	90	2	2	0	0	0
90	71	Western Home Communities	IA	779	382	297	100	2	1	1	0	0
91	NR	Crista Senior Living	WA	680	382	131	167	2	1	1	0	0
92	78	Phoebe Ministries	PA	1,216	378	171	667	4	4	0	0	0
93	79	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
94	NR	Maple Knoll Communities, Inc.	OH	676	368	90	218	2	2	0	0	0
95	NR	Friends Homes, Inc.	NC	577	368	100	109	2	2	0	0	0
96	NR	Luther Manor	WI	732	366	156	210	2	1	0	1	0
97	NR	LifeStream Complete Senior Living, Inc.	AZ	661	357	144	160	8	0	3	3	2
98	NR	Porter Hills Retirement Communities and Services	MI	573	356	116	101	3	1	1	1	0
99	81	Presbyterian SeniorCare	PA	1,114	348	351	415	3	3	0	0	0
100	NR	The Ohio Masonic Home	OH	738	343	201	194	3	2	1	0	0

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

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

### 3-1b RANKED BY INDEPENDENT LIVING UNITS

2014 IL Rank	2013 IL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
101	82	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
102	NR	Messiah Lifeways	PA	680	339	157	184	2	1	1	0	0
103	NR	Lutheran Social Services of the South, Inc.	TX	586	339	149	98	4	2	1	1	0
104	83	Presbyterian Communities and Services	TX	856	329	139	388	2	2	0	0	0
105	NR	Smith Senior Living	IL	615	325	144	146	2	2	0	0	0
106	84	Morningside Ministries	TX	789	318	135	336	3	3	0	0	0
107	NR	Methodist Retirement Communities	TX	761	318	229	214	4	4	0	0	0
108	NR	Saint Therese	MN	693	302	69	322	3	2	0	1	0
109	NR	Masonic Homes of Kentucky	KY	680	302	125	253	3	1	1	1	0
110	NR	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
111	86	Ecumen	MN	2,371	288	1,447	636	36	0	4	24	8
112	NR	Lutheran Social Services of Michigan	MI	757	281	120	356	5	1	2	0	2
113	NR	Lutheran Social Ministries of New Jersey	NJ	678	281	130	267	2	1	0	0	1
114	NR	United Methodist Retirement Communities, Inc.	MI	564	279	200	85	3	2	1	0	0
115	NR	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
116	85	Presbyterian Communities of South Carolina	SC	850	270	314	266	5	5	0	0	0
117	NR	Albright Care Services	PA	723	269	166	288	2	2	0	0	0
118	NR	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
119	87	Loretto	NY	1,475	259	593	623	8	1	2	4	1
120	88	Lutheran Services Carolinas	NC	1,262	257	273	732	8	1	1	1	5
121	NR	Baptist Homes Society	PA	580	257	134	189	2	1	0	1	0
122	89	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
123	NR	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
124	90	Lutheran Life Communities	IL	1,279	233	299	747	5	5	0	0	0
125	NR	Baptist Life Communities	KY	560	218	75	267	4	1	2	0	1

NR indicates that organization was not among largest 100 in the 2013 report

### 3-1 2014 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2014 IL Rank	2013 IL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
126	NR	Mercy Community Health	CT	581	205	120	256	2	1	0	0	1
127	93	United Methodist Memorial Home	IN	946	199	472	275	3	3	0	0	0
128	NR	Christian Care Communities, Inc.	KY	653	185	0	468	6	4	1	0	1
129	NR	Asbury Inc.	TN	635	177	126	332	3	2	0	0	1
130	NR	Heritage Ministries	NY	624	156	68	400	8	0	3	2	3
131	91	Bethesda Senior Living Communities	CO	1,362	155	1,207	0	18	0	1	17	0
132	92	Elim Care, Inc.	MN	1,592	154	430	1,008	23	0	4	9	10
133	NR	Lutheran Life Villages	IN	684	154	127	403	3	1	0	0	2
134	NR	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
135	96	Elant	NY	995	148	144	703	6	1	0	1	4
136	NR	BHI Senior Living, Inc.	IN	769	147	397	225	3	3	0	0	0
137	NR	St. John's Lutheran Ministries	MT	576	144	246	186	4	3	0	1	0
138	NR	Lutheran Homes Society	OH	706	142	171	393	5	2	1	0	2
139	NR	Wellspring Lutheran Services	MI	736	128	224	384	10	1	3	2	4
140	94	United Church Homes, Inc.	OH	983	110	205	668	6	4	0	0	2
142	NR	United Methodist Homes	CT	659	90	406	163	6	1	0	3	2
141	NR	Church Homes inc.	CT	659	90	406	163	6	1	0	3	2
143	97	United Methodist Homes of New Jersey	NJ	1,026	88	686	252	5	1	0	4	0
144	NR	Eventide	MN	742	73	268	401	7	0	1	3	3
145	NR	Vincentian Collaborative System	PA	675	66	82	527	4	2	0	0	2
146	99	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
147	95	Los Angeles Jewish Home	CA	831	50	271	510	3	2	0	0	1
148	NR	Jewish Home Lifecare	NY	1,651	21	0	1,630	4	0	1	0	3
149	98	Augustana Care	MN	1,901	0	1,120	781	18	0	0	12	6
150	NR	LindenGrove, Inc.	WI	650	0	189	461	9	0	0	5	4

Note: The 2013 report ranked only 100 largest systems whereby 2014 ranks the largest 150 systems

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

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

### 3-1c RANKED BY ASSISTED LIVING UNITS

2014 AL Rank	2013 AL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,286	4,936	2,194	11,156	173	77	8	35	53
2	2	Presbyterian Homes and Services	MN	6,782	3,339	2,065	1,378	37	12	21	2	2
3	3	Ecumen	MN	2,371	288	1,447	636	36	0	4	24	8
4	4	Bethesda Senior Living Communities	CO	1,362	155	1,207	0	18	0	1	17	0
5	6	National Senior Campuses	MD	17,682	15,247	1,173	1,262	15	15	0	0	0
6	5	Augustana Care	MN	1,901	0	1,120	781	18	0	0	12	6
7	9	ACTS Retirement Services, Inc.	PA	8,051	5,711	907	1,433	23	23	0	0	0
8	7	Concordia Lutheran Ministries	PA	1,728	554	878	296	10	4	0	6	0
9	8	Retirement Housing Foundation	CA	4,104	2,636	873	595	18	9	8	1	0
10	10	Covenant Retirement Communities, Inc.	IL	4,703	3,110	758	835	15	13	1	1	0
11	11	Lutheran Senior Services	MO	3,359	1,669	710	980	11	9	0	1	1
12	12	Volunteers of America	VA	2,335	480	707	1,148	24	4	3	7	10
13	13	United Methodist Homes of New Jersey	NJ	1,026	88	686	252	5	1	0	4	0
14	29	The Kendal Corporation	PA	3,727	2,554	617	556	15	13	2	0	0
15	16	Eskaton	CA	1,565	533	606	426	13	1	3	6	3
16	15	Loretto	NY	1,475	259	593	623	8	1	2	4	1
17	19	Ohio Presbyterian Retirement Services	OH	3,022	1,669	557	796	11	11	0	0	0
18	18	Presbyterian Manors of Mid-America, Inc.	KS	2,375	840	547	988	18	16	0	1	1
19	20	Presbyterian Senior Living	PA	3,176	1,425	499	1,252	20	12	5	2	1
20	17	Diakon Lutheran Social Ministries	PA	2,261	940	490	831	9	9	0	0	0
21	26	Front Porch Communities and Services	CA	2,835	1,816	481	538	10	5	5	0	0
22	25	National Church Residences	OH	1,616	604	472	540	8	5	0	2	1
23	23	United Methodist Memorial Home	IN	946	199	472	275	3	3	0	0	0
24	24	Westminster Communities of Florida	FL	3,312	2,106	455	751	9	9	0	0	0
25	28	Holland Home	MI	1,419	723	455	241	4	3	0	0	1

### 3-1 2014 LeadingAge Ziegler 150

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

3-1c RANKED BY ASSISTED LIVING UNITS

2014 AL Rank	2013 AL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	27	Elim Care, Inc.	MN	1,592	154	430	1,008	23	0	4	9	10
27	42	Virginia United Methodist Homes, Inc.	VA	1,213	516	424	273	7	6	0	1	0
28	37	Senior Quality Lifestyles Corporation	TX	1,782	1,054	419	309	6	6	0	0	0
29	NR	United Methodist Homes	CT	659	90	406	163	6	1	0	3	2
30	NR	Church Homes inc.	CT	659	90	406	163	6	1	0	3	2
31	NR	BHI Senior Living, Inc.	IN	769	147	397	225	3	3	0	0	0
32	32	Greencroft Communities	IN	1,406	517	390	499	6	6	0	0	0
33	33	Franciscan Communities, Inc.	IL	1,912	751	385	776	8	4	1	3	0
34	34	Shell Point	FL	2,037	1,332	377	328	2	2	0	0	0
35	21	Cornerstone Affiliates	CA	2,960	1,735	368	857	11	11	0	0	0
36	22	Providence Life Services	IL	1,553	665	360	528	9	1	4	1	3
37	47	Presbyterian SeniorCare	PA	1,114	348	351	415	3	3	0	0	0
38	35	Otterbein Senior Lifestyle Choices	OH	1,797	744	350	703	10	5	0	0	5
39	36	Pacific Retirement Services	OR	2,824	2,092	344	388	9	8	1	0	0
40	38	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
41	39	Asbury Communities	MD	2,773	1,941	334	498	5	5	0	0	0
42	40	Lutheran Homes of South Carolina	SC	1,029	386	327	316	5	5	0	0	0
43	54	Mississippi Methodist Senior Services, Inc.	MS	1,442	807	315	320	12	2	8	0	2
44	45	Presbyterian Communities of South Carolina	SC	850	270	314	266	5	5	0	0	0
45	NR	Liberty Lutheran Services	PA	893	384	301	208	4	3	0	1	0
46	55	WesleyLife	IA	1,431	694	299	438	7	7	0	0	0
47	50	Lutheran Life Communities	IL	1,279	233	299	747	5	5	0	0	0
48	60	Western Home Communities	IA	779	382	297	100	2	1	1	0	0
49	49	Christian Care Companies	AZ	1,789	1,434	289	66	4	1	3	0	0
50	51	Christian Homes, Inc.	IL	2,508	544	283	1,681	13	13	0	0	0

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

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

### 3-1c RANKED BY ASSISTED LIVING UNITS

2014 AL Rank	2013 AL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	77	Springpoint Senior Living, Inc.	NJ	1,981	1,445	279	257	6	6	0	0	0
52	52	Homewood Retirement Centers	MD	1,646	918	277	451	5	4	1	0	0
53	48	Lutheran Services Carolinas	NC	1,262	257	273	732	8	1	1	1	5
54	53	Masonicare, Inc.	CT	1,266	458	272	536	8	1	3	2	2
55	30	Los Angeles Jewish Home	CA	831	50	271	510	3	2	0	0	1
56	31	be.group	CA	1,359	859	268	232	7	6	0	1	0
57	NR	Eventide	MN	742	73	268	401	7	0	1	3	3
58	56	Masonic Villages	PA	2,347	1,419	259	669	5	3	1	1	0
59	71	SantaFe Senior Living	FL	1,228	876	252	100	3	3	0	0	0
60	57	Lutheran Social Services of South Central Pennsylvania	PA	1,138	553	251	334	6	6	0	0	0
61	58	Living Branches	PA	852	463	246	143	3	2	0	1	0
62	NR	St. John's Lutheran Ministries	MT	576	144	246	186	4	3	0	1	0
63	43	Buckner Retirement Services, Inc.	TX	1,456	857	243	356	7	5	2	0	0
65	69	Cedar Community	WI	895	425	241	229	6	1	2	2	1
64	59	United Methodist Homes	NY	1,061	394	241	426	4	3	0	1	0
66	46	Presbyterian Villages of Michigan	MI	1,318	901	239	178	8	2	6	0	0
67	41	Lutheran SeniorLife	PA	1,173	481	234	458	7	2	5	0	0
68	NR	Methodist Retirement Communities	TX	761	318	229	214	4	4	0	0	0
69	NR	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
70	61	EMA	MD	1,156	651	228	277	4	3	0	1	0
71	62	Virginia Baptist Homes	VA	1,204	760	225	219	4	4	0	0	0
72	63	Presbyterian Homes	IL	1,446	859	224	363	5	3	1	1	0
73	NR	Wellspring Lutheran Services	MI	736	128	224	384	10	1	3	2	4
74	66	Wesley Enhanced Living	PA	1,022	501	221	300	6	5	1	0	0
75	64	Willow Valley Communities	PA	2,026	1,530	219	277	3	3	0	0	0

NR indicates that organization was not among largest 100 in the 2013 report

### 3-1 2014 LeadingAge Ziegler 150

#### The Nation's Largest Not-for-profit Multi-site Senior Living Organizations 3-1c RANKED BY ASSISTED LIVING UNITS

2014 AL Rank	2013 AL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	65	Presby's Inspired Life	PA	965	491	214	260	4	2	0	1	1
77	67	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
78	68	VMP	WI	889	447	205	237	2	2	0	0	0
79	85	United Church Homes, Inc.	OH	983	110	205	668	6	4	0	0	2
80	NR	Sunset Retirement Communities and Services	MI	822	491	201	130	4	1	1	1	1
81	NR	The Ohio Masonic Home	OH	738	343	201	194	3	2	1	0	0
82	NR	United Methodist Retirement Communities, Inc.	MI	564	279	200	85	3	2	1	0	0
83	NR	LindenGrove, Inc.	WI	650	0	189	461	9	0	0	5	4
84	70	Friendship Senior Options	IL	1,259	785	183	291	2	2	0	0	0
85	72	Baptist Village Communities	OK	1,280	774	181	325	8	3	5	0	0
86	73	Menno Haven	PA	920	531	177	212	3	2	1	0	0
87	75	Phoebe Ministries	PA	1,216	378	171	667	4	4	0	0	0
88	NR	Lutheran Homes Society	OH	706	142	171	393	5	2	1	0	2
89	NR	Albright Care Services	PA	723	269	166	288	2	2	0	0	0
90	76	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
91	78	Oakwood Lutheran Senior Ministries	WI	885	588	160	137	2	2	0	0	0
92	NR	Messiah Lifeways	PA	680	339	157	184	2	1	1	0	0
93	NR	Luther Manor	WI	732	366	156	210	2	1	0	1	0
94	79	Lifespace Communities, Inc.	IA	4,072	3,093	154	825	12	12	0	0	0
95	74	Simpson Senior Services	PA	839	494	153	192	3	3	0	0	0
96	NR	Christian Living Communities	CO	744	413	152	179	3	3	0	0	0
97	NR	Lutheran Social Services of the South, Inc.	TX	586	339	149	98	4	2	1	1	0
98	NR	Landis Communities	PA	718	471	144	103	3	1	1	0	1
99	NR	LifeStream Complete Senior Living, Inc.	AZ	661	357	144	160	8	0	3	3	2
100	NR	Smith Senior Living	IL	615	325	144	146	2	2	0	0	0

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

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

### 3-1c RANKED BY ASSISTED LIVING UNITS

2014 AL Rank	2013 AL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
101	80	Elant	NY	995	148	144	703	6	1	0	1	4
102	NR	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
103	NR	Sunnyside Presbyterian Home, Inc.	VA	780	504	142	134	12	3	3	3	3
104	NR	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
105	81	Presbyterian Communities and Services	TX	856	329	139	388	2	2	0	0	0
106	82	Christian Care Centers	TX	752	386	138	228	3	3	0	0	0
107	83	Sears Methodist Retirement System, Inc.	TX	1,097	529	136	432	6	5	0	0	1
108	84	Morningside Ministries	TX	789	318	135	336	3	3	0	0	0
109	NR	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
110	86	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
111	NR	Life Enriching Communities	OH	751	458	134	159	2	2	0	0	0
112	NR	Baptist Homes Society	PA	580	257	134	189	2	1	0	1	0
113	87	The Presbyterian Homes, Inc.	NC	958	636	133	189	3	3	0	0	0
114	NR	Presbyterian Retirement Communities Northwest	WA	591	397	132	62	3	3	0	0	0
115	NR	Crista Senior Living	WA	680	382	131	167	2	1	1	0	0
116	NR	Lutheran Social Ministries of New Jersey	NJ	678	281	130	267	2	1	0	0	1
117	88	Air Force Villages, Inc.	TX	993	728	129	136	2	2	0	0	0
118	NR	Lutheran Life Villages	IN	684	154	127	403	3	1	0	0	2
119	89	LutherCare	PA	810	473	126	211	3	2	0	0	1
120	NR	Asbury Inc.	TN	635	177	126	332	3	2	0	0	1
121	NR	Masonic Homes of Kentucky	KY	680	302	125	253	3	1	1	1	0
122	90	Westminster Ingleside Retirement Communities	DC	877	607	124	146	3	3	0	0	0
123	NR	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
124	91	Northern California Presbyterian Homes and Services, Inc.	CA	1,088	824	123	141	5	3	1	1	0
125	NR	Lutheran Social Services of Michigan	MI	757	281	120	356	5	1	2	0	2

NR indicates that organization was not among largest 100 in the 2013 report

### 3-1 2014 LeadingAge Ziegler 150

#### The Nation's Largest Not-for-profit Multi-site Senior Living Organizations 3-1c RANKED BY ASSISTED LIVING UNITS

2014 AL Rank	2013 AL Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
126	NR	Mercy Community Health	CT	581	205	120	256	2	1	0	0	1
127	92	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
128	NR	Porter Hills Retirement Communities and Services	MI	573	356	116	101	3	1	1	1	0
129	94	The United Methodist Retirement Homes, Inc.	NC	933	626	105	202	3	3	0	0	0
130	NR	Friends Homes, Inc.	NC	577	368	100	109	2	2	0	0	0
131	93	Episcopal Senior Communities	CA	1,488	1,013	99	376	6	6	0	0	0
132	95	Goodwin House Incorporated	VA	832	585	99	148	2	2	0	0	0
133	NR	Maple Knoll Communities, Inc.	OH	676	368	90	218	2	2	0	0	0
134	NR	National Lutheran Communities & Services	MD	656	397	89	170	3	2	0	1	0
135	NR	Wesley Homes	WA	688	453	87	148	2	2	0	0	0
136	NR	Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
137	NR	Vincentian Collaborative System	PA	675	66	82	527	4	2	0	0	2
138	96	Givens Estates	NC	802	581	77	144	2	2	0	0	0
139	NR	Life Care Pastoral Services	FL	550	384	76	90	2	2	0	0	0
140	NR	Medford Leas	NJ	552	410	75	67	2	1	1	0	0
141	98	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
142	NR	Baptist Life Communities	KY	560	218	75	267	4	1	2	0	1
143	97	United Church Homes and Services	NC	948	530	74	344	3	3	0	0	0
144	NR	The Loomis Communities	MA	635	427	74	134	4	4	0	0	0
145	NR	Saint Therese	MN	693	302	69	322	3	2	0	1	0
146	NR	Heritage Ministries	NY	624	156	68	400	8	0	3	2	3
147	99	Mather LifeWays	IL	900	623	46	231	4	2	1	0	1
148	100	Bethesda Health Group, Inc.	MO	1,369	549	18	802	7	1	4	0	2
149	NR	Christian Care Communities, Inc.	KY	653	185	0	468	6	4	1	0	1
150	NR	Jewish Home Lifecare	NY	1,651	21	0	1,630	4	0	1	0	3

Note: The 2013 report ranked only 100 largest systems whereby 2014 ranks the largest 150 systems

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

### The Nation's Largest Not-for-profit Multi-site Senior Living Organizations 3-1d RANKED BY NURSING CARE BEDS

2014 NCB Rank	2013 NCB Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,286	4,936	2,194	11,156	173	77	8	35	53
2	2	Christian Homes, Inc.	IL	2,508	544	283	1,681	13	13	0	0	0
3	NR	Jewish Home Lifecare	NY	1,651	21	0	1,630	4	0	1	0	3
4	3	ACTS Retirement Services, Inc.	PA	8,051	5,711	907	1,433	23	23	0	0	0
5	4	Presbyterian Homes and Services	MN	6,782	3,339	2,065	1,378	37	12	21	2	2
6	8	National Senior Campuses	MD	17,682	15,247	1,173	1,262	15	15	0	0	0
7	6	Presbyterian Senior Living	PA	3,176	1,425	499	1,252	20	12	5	2	1
8	7	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
9	5	Volunteers of America	VA	2,335	480	707	1,148	24	4	3	7	10
10	10	Elim Care, Inc.	MN	1,592	154	430	1,008	23	0	4	9	10
11	9	Presbyterian Manors of Mid-America, Inc.	KS	2,375	840	547	988	18	16	0	1	1
12	12	Lutheran Senior Services	MO	3,359	1,669	710	980	11	9	0	1	1
13	26	Cornerstone Affiliates	CA	2,960	1,735	368	857	11	11	0	0	0
14	19	Covenant Retirement Communities, Inc.	IL	4,703	3,110	758	835	15	13	1	1	0
15	11	Diakon Lutheran Social Ministries	PA	2,261	940	490	831	9	9	0	0	0
16	15	Lifespace Communities, Inc.	IA	4,072	3,093	154	825	12	12	0	0	0
17	16	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
18	17	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
19	13	Bethesda Health Group, Inc.	MO	1,369	549	18	802	7	1	4	0	2
20	20	Ohio Presbyterian Retirement Services	OH	3,022	1,669	557	796	11	11	0	0	0
21	21	Augustana Care	MN	1,901	0	1,120	781	18	0	0	12	6
22	22	Franciscan Communities, Inc.	IL	1,912	751	385	776	8	4	1	3	0
23	23	Westminster Communities of Florida	FL	3,312	2,106	455	751	9	9	0	0	0
24	24	Lutheran Life Communities	IL	1,279	233	299	747	5	5	0	0	0
25	25	Lutheran Services Carolinas (fka Lutheran Services for the Aging)	NC	1,262	257	273	732	8	1	1	1	5

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

### The Nation's Largest Not-for-profit Multi-site Senior Living Organizations 3-1d RANKED BY NURSING CARE BEDS

2014 NCB Rank	2013 NCB Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	28	Otterbein Senior Lifestyle Choices	OH	1,797	744	350	703	10	5	0	0	5
27	29	Elant	NY	995	148	144	703	6	1	0	1	4
28	31	Masonic Villages	PA	2,347	1,419	259	669	5	3	1	1	0
29	33	United Church Homes, Inc.	OH	983	110	205	668	6	4	0	0	2
30	32	Phoebe Ministries	PA	1,216	378	171	667	4	4	0	0	0
31	18	Ecumen	MN	2,371	288	1,447	636	36	0	4	24	8
32	27	Loretto	NY	1,475	259	593	623	8	1	2	4	1
33	34	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
34	35	Retirement Housing Foundation	CA	4,104	2,636	873	595	18	9	8	1	0
35	45	The Kendal Corporation	PA	3,727	2,554	617	556	15	13	2	0	0
36	36	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
37	37	National Church Residences	OH	1,616	604	472	540	8	5	0	2	1
38	38	Front Porch Communities and Services	CA	2,835	1,816	481	538	10	5	5	0	0
39	39	Masonicare, Inc.	CT	1,266	458	272	536	8	1	3	2	2
40	30	Providence Life Services	IL	1,553	665	360	528	9	1	4	1	3
41	NR	Vincentian Collaborative System	PA	675	66	82	527	4	2	0	0	2
42	41	Los Angeles Jewish Home	CA	831	50	271	510	3	2	0	0	1
43	40	Greencroft Communities	IN	1,406	517	390	499	6	6	0	0	0
44	42	Asbury Communities	MD	2,773	1,941	334	498	5	5	0	0	0
45	NR	Christian Care Communities, Inc.	KY	653	185	0	468	6	4	1	0	1
46	NR	LindenGrove, Inc.	WI	650	0	189	461	9	0	0	5	4
47	43	Lutheran SeniorLife	PA	1,173	481	234	458	7	2	5	0	0
48	44	Homewood Retirement Centers	MD	1,646	918	277	451	5	4	1	0	0
49	54	WesleyLife	IA	1,431	694	299	438	7	7	0	0	0
50	46	Sears Methodist Retirement System, Inc.	TX	1,097	529	136	432	6	5	0	0	1

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

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

3-1d RANKED BY NURSING CARE BEDS

2014 NCB Rank	2013 NCB Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	47	Eskaton	CA	1,565	533	606	426	13	1	3	6	3
52	48	United Methodist Homes	NY	1,061	394	241	426	4	3	0	1	0
53	49	Presbyterian SeniorCare	PA	1,114	348	351	415	3	3	0	0	0
54	NR	Lutheran Life Villages	IN	684	154	127	403	3	1	0	0	2
55	NR	Eventide	MN	742	73	268	401	7	0	1	3	3
56	NR	Heritage Ministries	NY	624	156	68	400	8	0	3	2	3
57	NR	Lutheran Homes Society	OH	706	142	171	393	5	2	1	0	2
58	51	Pacific Retirement Services	OR	2,824	2,092	344	388	9	8	1	0	0
59	50	Presbyterian Communities and Services	TX	856	329	139	388	2	2	0	0	0
60	NR	Wellspring Lutheran Services (fka Lutheran Homes of Michigan)	MI	736	128	224	384	10	1	3	2	4
62	52	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
61	53	Episcopal Senior Communities	CA	1,488	1,013	99	376	6	6	0	0	0
63	NR	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
64	55	Presbyterian Homes	IL	1,446	859	224	363	5	3	1	1	0
65	66	Buckner Retirement Services, Inc.	TX	1,456	857	243	356	7	5	2	0	0
66	NR	Lutheran Social Services of Michigan	MI	757	281	120	356	5	1	2	0	2
67	60	United Church Homes and Services	NC	948	530	74	344	3	3	0	0	0
68	58	Morningside Ministries	TX	789	318	135	336	3	3	0	0	0
69	56	Lutheran Social Services of South Central Pennsylvania	PA	1,138	553	251	334	6	6	0	0	0
70	NR	Asbury Inc.	TN	635	177	126	332	3	2	0	0	1
71	59	Shell Point	FL	2,037	1,332	377	328	2	2	0	0	0
72	61	Baptist Village Communities	OK	1,280	774	181	325	8	3	5	0	0
73	NR	Saint Therese	MN	693	302	69	322	3	2	0	1	0
74	63	Mississippi Methodist Senior Services, Inc.	MS	1,442	807	315	320	12	2	8	0	2
75	62	Lutheran Homes of South Carolina	SC	1,029	386	327	316	5	5	0	0	0

NR indicates that organization was not among largest 100 in the 2013 report

### 3-1 2014 LeadingAge Ziegler 150

#### The Nation's Largest Not-for-profit Multi-site Senior Living Organizations 3-1d RANKED BY NURSING CARE BEDS

2014 NCB Rank	2013 NCB Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	71	Senior Quality Lifestyles Corporation	TX	1,782	1,054	419	309	6	6	0	0	0
77	64	Wesley Enhanced Living	PA	1,022	501	221	300	6	5	1	0	0
78	65	Concordia Lutheran Ministries	PA	1,728	554	878	296	10	4	0	6	0
79	77	Friendship Senior Options	IL	1,259	785	183	291	2	2	0	0	0
80	NR	Albright Care Services	PA	723	269	166	288	2	2	0	0	0
81	NR	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
83	67	EMA	MD	1,156	651	228	277	4	3	0	1	0
82	68	Willow Valley Communities	PA	2,026	1,530	219	277	3	3	0	0	0
84	73	United Methodist Memorial Home	IN	946	199	472	275	3	3	0	0	0
85	74	Virginia United Methodist Homes, Inc.	VA	1,213	516	424	273	7	6	0	1	0
86	NR	Lutheran Social Ministries of New Jersey	NJ	678	281	130	267	2	1	0	0	1
87	NR	Baptist Life Communities	KY	560	218	75	267	4	1	2	0	1
88	69	Presbyterian Communities of South Carolina	SC	850	270	314	266	5	5	0	0	0
89	72	Presby's Inspired Life	PA	965	491	214	260	4	2	0	1	1
90	75	Springpoint Senior Living, Inc.	NJ	1,981	1,445	279	257	6	6	0	0	0
91	NR	Mercy Community Health	CT	581	205	120	256	2	1	0	0	1
92	NR	Masonic Homes of Kentucky	KY	680	302	125	253	3	1	1	1	0
93	76	United Methodist Homes of New Jersey	NJ	1,026	88	686	252	5	1	0	4	0
94	70	Holland Home	MI	1,419	723	455	241	4	3	0	0	1
95	79	VMP	WI	889	447	205	237	2	2	0	0	0
96	80	be.group	CA	1,359	859	268	232	7	6	0	1	0
97	81	Mather LifeWays	IL	900	623	46	231	4	2	1	0	1
98	78	Cedar Community	WI	895	425	241	229	6	1	2	2	1
99	57	Christian Care Centers	TX	752	386	138	228	3	3	0	0	0
100	NR	BHI Senior Living, Inc.	IN	769	147	397	225	3	3	0	0	0

NR indicates that organization was not among largest 100 in the 2013 report

LeadingAge 150 Ziegler

## 3-1 2014 LeadingAge Ziegler 150

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

3-1d RANKED BY NURSING CARE BEDS

2014 NCB Rank	2013 NCB Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
101	83	Virginia Baptist Homes	VA	1,204	760	225	219	4	4	0	0	0
102	NR	Maple Knoll Communities, Inc.	OH	676	368	90	218	2	2	0	0	0
103	NR	Methodist Retirement Communities	TX	761	318	229	214	4	4	0	0	0
104	84	Menno Haven	PA	920	531	177	212	3	2	1	0	0
105	82	LutherCare	PA	810	473	126	211	3	2	0	0	1
106	NR	Luther Manor	WI	732	366	156	210	2	1	0	1	0
107	NR	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
108	NR	Liberty Lutheran Services	PA	893	384	301	208	4	3	0	1	0
109	85	The United Methodist Retirement Homes, Inc.	NC	933	626	105	202	3	3	0	0	0
110	NR	The Ohio Masonic Home	OH	738	343	201	194	3	2	1	0	0
111	86	Simpson Senior Services	PA	839	494	153	192	3	3	0	0	0
112	NR	Baptist Homes Society	PA	580	257	134	189	2	1	0	1	0
113	87	The Presbyterian Homes, Inc.	NC	958	636	133	189	3	3	0	0	0
114	NR	St. John's Lutheran Ministries	MT	576	144	246	186	4	3	0	1	0
115	NR	Messiah Lifeways	PA	680	339	157	184	2	1	1	0	0
116	NR	Christian Living Communities	CO	744	413	152	179	3	3	0	0	0
117	88	Presbyterian Villages of Michigan	MI	1,318	901	239	178	8	2	6	0	0
118	NR	National Lutheran Communities & Services	MD	656	397	89	170	3	2	0	1	0
119	NR	Crista Senior Living	WA	680	382	131	167	2	1	1	0	0
121	NR	United Methodist Homes	CT	659	90	406	163	6	1	0	3	2
120	NR	Church Homes inc.	CT	659	90	406	163	6	1	0	3	2
122	NR	LifeStream Complete Senior Living, Inc.	AZ	661	357	144	160	8	0	3	3	2
123	NR	Life Enriching Communities	OH	751	458	134	159	2	2	0	0	0
124	89	Goodwin House Incorporated	VA	832	585	99	148	2	2	0	0	0
125	NR	Wesley Homes	WA	688	453	87	148	2	2	0	0	0

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

### The Nation's Largest Not-for-profit Multi-site Senior Living Organizations 3-1d RANKED BY NURSING CARE BEDS

2014 NCB Rank	2013 NCB Rank	System Name	State	Units (as of 12/31/13)				Communities (as of 12/31/13)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
127	NR	Smith Senior Living	IL	615	325	144	146	2	2	0	0	0
126	90	Westminster Ingleside Retirement Communities	DC	877	607	124	146	3	3	0	0	0
128	95	Givens Estates	NC	802	581	77	144	2	2	0	0	0
129	91	Living Branches	PA	852	463	246	143	3	2	0	1	0
130	92	Northern California Presbyterian Homes and Services, Inc.	CA	1,088	824	123	141	5	3	1	1	0
131	93	Oakwood Lutheran Senior Ministries	WI	885	588	160	137	2	2	0	0	0
132	94	Air Force Villages, Inc.	TX	993	728	129	136	2	2	0	0	0
133	NR	Sunnyside Presbyterian Home, Inc.	VA	780	504	142	134	12	3	3	3	3
134	NR	The Loomis Communities	MA	635	427	74	134	4	4	0	0	0
135	NR	Sunset Retirement Communities and Services	MI	822	491	201	130	4	1	1	1	1
136	NR	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
137	NR	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
138	NR	Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
139	NR	Friends Homes, Inc.	NC	577	368	100	109	2	2	0	0	0
140	NR	Landis Communities	PA	718	471	144	103	3	1	1	0	1
141	NR	Porter Hills Retirement Communities and Services	MI	573	356	116	101	3	1	1	1	0
143	97	Western Home Communities	IA	779	382	297	100	2	1	1	0	0
142	99	SantaFe Senior Living	FL	1,228	876	252	100	3	3	0	0	0
144	NR	Lutheran Social Services of the South, Inc.	TX	586	339	149	98	4	2	1	1	0
145	NR	Life Care Pastoral Services	FL	550	384	76	90	2	2	0	0	0
146	NR	United Methodist Retirement Communities, Inc.	MI	564	279	200	85	3	2	1	0	0
147	NR	Medford Leas	NJ	552	410	75	67	2	1	1	0	0
148	98	Christian Care Companies	AZ	1,789	1,434	289	66	4	1	3	0	0
149	NR	Presbyterian Retirement Communities Northwest	WA	591	397	132	62	3	3	0	0	0
150	100	Bethesda Senior Living Communities	CO	1,362	155	1,207	0	18	0	1	17	0

Note: The 2013 report ranked only 100 largest systems whereby 2014 ranks the largest 150 systems

NR indicates that organization was not among largest 100 in the 2013 report

## 3-1 2014 LeadingAge Ziegler 150

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

#### 3-1e THE NEXT 50

The LZ 150 stops at the 150th largest system, leaving a number of senior living systems just beyond the list's cut-off.

The "First 25" represents organizations ranked from 151-175 and the "Second 25" reflects organizations ranked from 176-200.

#### First 25 (545 to 422 Total Units)

Allegheny Lutheran Social Ministries (PA)  
 Beechwood Continuing Care (NY)  
 Cadbury Senior Services, Inc. (NJ)  
 Clark Retirement Community (MI)  
 Deaconess Abundant Life Communities (MA)  
 Elder Care Alliance (CA)  
 Evangelical Homes of Michigan (MI)  
 Judson Services Inc. (OH)  
 Lutheran Living Services (WI)  
 Midwest Geriatrics, Inc. (NE)  
 Milwaukee Protestant Homes (WI)  
 Niagara Lutheran Health System (NY)  
 Presbyterian Homes and Services (NY)  
 Presbyterian Homes and Services of Kentucky (KY)  
 Presbyterian Homes in the Presbytery of Lake Erie (PA)  
 Presbyterian Homes of Georgia, Inc. (GA)  
 Redstone Highlands Senior Living Communities (PA)  
 Rockwood Retirement Communities (WA)  
 South Carolina Baptist Ministries for the Aging (SC)  
 The Eliza Jennings Senior Care Network (OH)  
 The Lutheran Home Association (MN)  
 The RiverWoods Company (NH)  
 United Methodist Services for the Aging (PA)  
 Wesleyan Senior Living (OH)  
 Willow Brook Christian Communities (OH)

#### Second 25 (419 to 273 Total Units)

Appalachian Christian Village (TN)  
 Bethesda Health & Housing (MN)  
 Brazos Presbyterian Homes Inc. (TX)  
 CJE SeniorLife (IL)  
 Colonial Senior Services, Inc. (OH)  
 Crest View Corporation (MN)  
 Episcopal Communities & Services (CA)  
 Episcopal Retirement Homes, Inc (OH)  
 Episcopal SeniorLife Communities (NY)  
 Good Shepherd Communities (NY)  
 Homme, Inc. of Wisconsin (WI)  
 Jewish Senior Life of Metropolitan Detroit (MI)  
 Lincoln Lutheran (WI)  
 Lutheran Homes of Oshkosh (WI)  
 Lutheran Social Services of Central Ohio (OH)  
 Lyngblomsten (MN)  
 Presbyterian Senior Care of WNY, Inc. (NY)  
 Resthaven (MI)  
 Skaalen Retirement Services (WI)  
 St. Andrew's Resources for Seniors System (MO)  
 The Glen Retirement System (LA)  
 Three Pillars Senior Living Communities (WI)  
 Valley View Haven, Inc. (PA)  
 Wesbury (PA)  
 WRC Senior Services (PA)

## 3-2 2014 LeadingAge Ziegler 150

### The Rankings: Change at a Glance

#### 3-2a GREATEST CHANGES IN UNITS

Greatest Increase and Decrease	State	YE 2013 Units	YE 2012 Units	Change
<b>Greatest Increase</b>				
Springpoint Senior Living, Inc.	NJ	1,981	1,601	+380
National Senior Campuses	MD	17,682	17,324	+358
The Kendal Corporation	PA	3,727	3,389	+338
Front Porch Communities & Services	CA	2,835	2,551	+284
<b>Greatest Decrease</b>				
Providence Life Services	IL	1,553	1,979	-426
Elder Care Alliance	CA	522	803	-281
Los Angeles Jewish Home	CA	831	1,092	-261
Christian Homes, Inc.	IL	2,508	2,706	-198
Volunteers of America	VA	2,335	2,532	-197
Evangelical Lutheran Good Samaritan Society	SD	18,286	18,462	-176

#### 3.2b GREATEST CHANGES IN RANK

Greatest Upward and Downward Change	State	2014 Rank	2013 Rank	Change
<b>Greatest Upward Movement</b>				
SantaFe Senior Living	FL	58	77	+19
Presbyterian Villages of Michigan	MI	52	69	+17
Springpoint Senior Living, Inc.	NJ	25	35	+10
Senior Quality Lifestyles Corporation	TX	30	38	+8
<b>Greatest Downward Movement</b>				
Los Angeles Jewish Home	CA	95	65	-30
Christian Care Centers	TX	106	88	-18
Providence Life Services	IL	38	25	-13
Bethesda Health Group, Inc.	MO	49	40	-9
be.group	CA	51	43	-8

# LeadingAge 150 Ziegler

# Chapter 4

## Analysis of the Data

The LeadingAge Ziegler 150 are examined through a number of categories: total units, total communities, geographic coverage, location, ratings, accreditation, number of employees, affiliations, founding dates, provision of government-subsidized (affordable) housing and provision of home and community-based services. This year's publication also added items regarding technology adoption, the existence of a foundation within the organization and a deeper dive into future growth plans for various models of home and community-based care.

### Units

The first analysis of the 2014 LZ 150 provides a side-by-side comparison of the unit mix for 2013 compared to 2012 for each of the organizations. The 2014 LZ 150 organizations own approximately 235,000 market-rate senior living units. By breaking the data into the largest 10, 25 and 50 (Chart 4-1c), one sees that the ratio of units held by the largest 50 compared with the percentage of total units in the LZ 150 is not balanced, e.g., the largest 50 systems hold more than 60% of the total units. The 10 largest systems own 32% of the total LZ 150 units. The average system within the 2014 LZ 150 had nearly 1,600 units in 2013 (Chart 4-1b). Approximately 50% of the 2014 LZ 150's total communities are CCRCs, with the remaining nearly 50% fairly evenly divided among stand-alone ILs, ALs and NHs.

**Summary of Not-for-Profit Units.** These columns show the total number of units, followed by a breakdown of this total by level of care, for each of the systems. The first set of columns shows the unit mix as of 12/31/13. The second set of columns shows the unit mix as of 12/31/12.

**Change in Total Units from 2012 to 2013.** This column provides the change in the listed organization's TOTAL market-rate units (all levels of care) between year-end 2013 and year-end 2012.

Section 4-1b provides two examinations of three-year comparisons of the LZ 150 organizations. The first table details the total number of units by level of care among the largest 10, 25, 50, 100 and 150 organizations. The percentage of total units is also detailed in 4-1b as well as 4-1c. This section also examines the unit mix between each of the three years' listings (e.g., the unit mix of the 2012 LZ 100 compared to the unit mix of the 2013 LZ 100, compared to the unit mix of the 2014 LZ 150). Charts 4-1d-h provide a more graphic illustration of the type of change occurring in the LZ 150. For all of the year-over-year comparisons made in 4.1b-4.1h, note that increase to 150 as part of the 2014 publication. In some instances, two figures are calculated for the current publication, one that reflects the largest 100 and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 150 listing.

## Communities

The unit analysis of the 2014 LZ 150 presented in Chart 4-1a is followed by a side-by-side comparison in Chart 4-2a of the community portfolios of the 2014 LZ 150 for 2013 compared to their portfolios at the end of 2012.

**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 150, 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 150 (these properties are examined in Chapter 6). The first set of columns in Chart 4-2a shows the communities owned, by type, as of 12/31/13. The second set of columns shows the communities owned, by type, as of 12/31/12.

**Change in Total Communities from 2012 to 2013.** This column provides the change in the listed organization's TOTAL communities (all types, excluding affordable housing) between year-end 2012 and year-end 2013. Chart 4-2b provides two examinations of three-year comparisons of the LZ 150 organizations. The first half of the chart examines the community holdings between each of the three years' LZ 150 listings (e.g., the types of communities owned by the 2012 LZ 100 compared to types of communities owned by the 2013 LZ 100, compared to the types of communities owned by the 2014 LZ 150). As with the year-over-year unit comparisons, in some instances, two figures are calculated for the current publication, one that reflects the largest 100 and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 150 listing.

## System Headquarters

The state shown for each of the LZ 150 indicates their headquarters' location. Pennsylvania is home to more LZ 150 headquarters than any other state, more than twice as many as the next leading states of California, Texas, Illinois, Minnesota and New York. Six of the Pennsylvania multi-sites' headquarters are in the largest 25.

## 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 2010 data and applied by preset rules. 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 150 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.

## Classifications

A multi-site's geographic market area, what the LZ 150 listing terms its primary classification, offers a descriptive glimpse of the location of the multi-site's senior living properties. A multi-site's primary classification describes the market area that includes ALL 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 150 are classified by their primary markets according to eight categories. Definitions and examples of the eight market categories are listed below:

- **National.** Systems whose properties are located among multiple states in more than one region of the United States. 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 150 #15) — 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 150 #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 150 #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 150 # 36) 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 150 #54) has communities currently operating in Illinois and Indiana. With the construction of their newest CCRC underway in Florida, Lutheran Life Communities will expand to a tri-state organization.
- **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 150 #58)—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 150 #45)—multiple communities centrally concentrated in Iowa.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: Presby's Inspired Life (LZ 150 #77)—multiple communities throughout the greater Philadelphia, PA, 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 150 #94) are located in the southwestern quadrant of the DC-Arlington metropolitan area.

Chart 4-6a shows that the bulk, 76%, 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 8.7% of the LZ 150 and tend to be among the largest of the LZ 150 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 150 #9) has a secondary metropolitan market, with a concentration of communities in St. Louis. The secondary classification provides a snapshot of a system's geographic concentration of communities. Nearly 50 of the LZ 150 systems have such a market concentration. (Chart 4-6c)

## Corporate Name Changes

An ongoing trend among a number of senior living organizations throughout the country, both multi-sites and single-site organizations, is that of changing the name of the organization to more accurately reflect the services provided. Section 4-7 details recent name changes from the past year.

## 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 12/31/13. Forty-seven (47) of the LZ 150 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, 69%, of the ratings for LZ 150 organizations fall in the "BBB" category (that is, with ratings of "BBB+," "BBB" or "BBB-").

## Revenues

Several years ago, the LZ 100 publication began to capture the type of revenue generated by each respective organization. With this year's LZ 150 publication, a slightly different approach was taken to gather revenue. As an additional means of evaluating the size of each organization (in addition to the total number of units and communities), overall revenue was gathered as part of this year's survey process. The majority of the organizations provided this information. Where information was not reported, the most recent, available 990s provided the detail needed for overall revenue. To avoid detailing each organization's total revenue for fiscal year 2013, organizations were grouped into tiers based on

their overall revenue. The largest LZ 150 organizations have revenues in excess of \$200 million (13 organizations). The largest number of LZ 150 organizations fall within the Tier IV category, which reflects annual revenue between \$25 million and \$49 million. Section 4-9 details the revenue statistics.

## Corporate Staff

Yet another area of the 2014 LZ 150 is an analysis of the corporate level staffing of select operating areas for the LZ 150 organizations (Charts 4-10a-c). Corporate-level positions, as well as reporting executive, changes in corporate staffing, and corporate tenure are all reported in this section.

## 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 listing of LZ 150 with organizations that have obtained CARF-CCAC or JCAHO (Joint Commission on the Accreditation of Healthcare Organizations) accreditation is shown in Chart 4-11a. A total of 186 communities within the LZ 150 are accredited through CARF-CCAC. An additional 15 have sought accreditation through JCAHO.

## Staffing

The LZ 150 analyses include an examination of the number of full-time equivalents (FTEs) each organization employs. An average of approximately 1,056 FTEs are employed per organization. Note that the number of FTEs decreased in the 2014 publication with the expansion to the largest 150 organizations. If only looking at the largest 100 and comparing to previous years, the number of FTEs increases to 1,331, similar to the previous year.

## Foundations

New to the 2014 publication are data on the percentage of LZ 150 organizations that have a foundation. The vast majority, nearly 71%, have a foundation. Of those organizations that do not currently have one, roughly 17% reported that they plan to create a foundation in the next 2-3 years.

## Affiliation

Nearly 90% of the LZ 150 organizations have an affiliation with a religious organization or a fraternal or military group (Chart 4-14a). The majority of those with affiliations are faith-based, predominantly those that are Lutheran, Methodist, Presbyterian and Baptist. When looking at the number of units represented by each of the affiliations, Lutheran organizations represent the largest number within the LZ 150, with more than 47,000 units. Presbyterian affiliation follows with slightly more than 31,000 units.

## Affordable Housing

The ranking of the LZ 150 organizations by the number of affordable (non market-rate) units is included with this research to show that a number of the LZ 150 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management of these organizations and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Section 4-15 and Chapter 6 detail these listings further. The data reveal that among the LZ 150, nearly half (49%) have affordable housing units.

## Managed Units and Communities

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 150 organizations are, on the contrary, primarily property owners. Approximately 28% of the LZ 150 manage as well as own senior living units (Chart 4-16c), but the overwhelming portion of their portfolio of units is owned.

## Assisted and Skilled Composition

New to the 2014 publication is the proportion of assisted living and skilled nursing units that are private versus semi-private. There is a clear trend toward private assisted living units, with 91.3% being private. On the other hand, the skilled nursing units are more likely to be semi-private, with 56% of the units semi-private and 44% private.

This year's publication is the fifth in which the percentage of LZ 150 organizations that own and operate memory support (MS) units is analyzed. Section 4-17 details the percentage of LZ 150, by the largest 10, 25, 50, 100 and 150, that offer specialized memory support units. In total, nearly three-quarters of the organizations offer memory support, with 36% offering both assisted living and skilled nursing memory care services. An additional 27% offer only assisted living memory support.

## Home and Community-Based Services (HCBS)

This year's survey gathered overall feedback on the percentage of providers offering home and community-based services, but specifically drilled down into Continuing Care at Home (CCaH), PACE, and Village/club membership programs and models. Overall, 53% of the LZ 150

organizations offer home and community-based services to non-residents. The number of organizations offering CCaH, PACE or Village/Club membership programs trend around 10%. Interest in the CCaH model appears to be growing, with roughly one-third of the organizations stating that they are considering offering a CCaH program in the next two years.

## Technology

Beginning with the 2013 LZ 100, information was gathered regarding the adoption of various aging-related technologies. Last year's data were reported in an addendum report, distributed following the 2013 overall LZ 100 report. With the 2014 publication, the technology findings are integrated into section 4-19. The majority of LZ 150 organizations, 75% and 73% respectively, reported using User-Activated Emergency Response Systems and Access Control/Wander Management Systems. Additional detailed findings are reported throughout that section. Additional data were also gathered this year for single-site organizations. Chapter 6 reveals the proportion of those organizations that have adopted various technologies.

## Joint Ventures

In line with trending around partnerships and collaboration, the 2014 publication explores the number of LZ 150 organizations that are engaged in joint ventures or in Accountable Care Organization (ACO) or bundled payment agreements. Nearly one-quarter of the LZ 150 organizations reported being in a joint venture. Most commonly, this is a venture with another not-for-profit organization, a hospital/health system or a home health/home care agency. With regard to formal health care reform contacts, roughly a quarter of the organizations are in a formal ACO or bundled payment contract.

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2012 to 2013
				2013 Units				2012 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,286	4,936	2,194	11,156	18,462	4,984	2,170	11,308	-176
2	2	National Senior Campuses	MD	17,682	15,247	1,173	1,262	17,324	15,280	917	1,127	358
3	3	ACTS Retirement Services, Inc.	PA	8,051	5,711	907	1,433	8,069	5,759	877	1,433	-18
4	4	Presbyterian Homes and Services	MN	6,782	3,339	2,065	1,378	6,582	3,294	1,940	1,348	200
5	5	Covenant Retirement Communities, Inc.	IL	4,703	3,110	758	835	4,612	3,087	720	805	91
6	6	Retirement Housing Foundation	CA	4,104	2,636	873	595	4,112	3,104	154	827	-8
7	7	Lifespace Communities, Inc.	IA	4,072	3,093	154	825	4,085	3,104	154	827	-13
8	8	The Kendal Corporation	PA	3,727	2,554	617	556	3,389	2,508	433	448	338
9	10	Lutheran Senior Services	MO	3,359	1,669	710	980	3,277	1,661	709	907	82
10	9	Westminster Communities of Florida	FL	3,312	2,106	455	751	3,299	2,088	460	751	13
11	11	Presbyterian Senior Living	PA	3,176	1,425	499	1,252	3,176	1,425	499	1,252	0
12	12	Ohio Presbyterian Retirement Services	OH	3,022	1,669	557	796	3,034	1,723	515	796	-12
13	13	Cornerstone Affiliates	CA	2,960	1,735	368	857	2,970	1,766	484	720	-10
14	17	Front Porch Communities and Services	CA	2,835	1,816	481	538	2,551	1,571	441	539	284
15	14	Pacific Retirement Services	OR	2,824	2,092	344	388	2,824	2,092	344	388	0
16	15	Asbury Communities	MD	2,773	1,941	334	498	2,775	1,943	334	498	-2
17	16	Christian Homes, Inc.	IL	2,508	544	283	1,681	2,706	676	280	1,750	-198
18	20	Presbyterian Manors of Mid-America, Inc.	KS	2,375	840	547	988	2,499	888	555	1,056	-124
19	18	Ecumen	MN	2,371	288	1,447	636	2,545	288	1,451	806	-174
20	22	Masonic Villages	PA	2,347	1,419	259	669	2,325	1,397	259	669	22
21	19	Volunteers of America	VA	2,335	480	707	1,148	2,532	482	707	1,343	-197
22	21	Diakon Lutheran Social Ministries	PA	2,261	940	490	831	2,449	901	576	972	-188
23	23	Shell Point	FL	2,037	1,332	377	328	2,042	1,337	377	328	-5
24	24	Willow Valley Communities	PA	2,026	1,530	219	277	1,997	1,501	219	277	29
25	35	Springpoint Senior Living, Inc.	NJ	1,981	1,445	279	257	1,601	1,180	164	257	380

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2012 to 2013
				2013 Units				2012 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	26	Franciscan Communities, Inc.	IL	1,912	751	385	776	1,912	751	385	776	0
27	27	Augustana Care	MN	1,901	0	1,120	781	1,896	80	1,035	781	5
28	28	Otterbein Senior Lifestyle Choices	OH	1,797	744	350	703	1,797	744	350	703	0
29	29	Christian Care Companies	AZ	1,789	1,434	289	66	1,786	1,434	284	68	3
30	38	Senior Quality Lifestyles Corporation	TX	1,782	1,054	419	309	1,587	989	337	261	195
31	30	Concordia Lutheran Ministries	PA	1,728	554	878	296	1,745	554	901	290	-17
32	NR	Jewish Home Lifecare	NY	1,651	21	0	1,630	1,651	21	0	1,403	0
33	34	Homewood Retirement Centers	MD	1,646	918	277	451	1,631	907	273	451	15
34	31	National Church Residences	OH	1,616	604	472	540	1,691	705	446	540	-75
35	37	Hebrew SeniorLife	MA	1,593	660	119	814	1,593	660	119	814	0
36	33	Elim Care, Inc.	MN	1,592	154	430	1,008	1,638	190	441	1,007	-46
37	39	Eskaton	CA	1,565	533	606	426	1,564	530	608	426	1
38	25	Providence Life Services	IL	1,553	665	360	528	1,979	808	472	699	-426
39	41	Episcopal Senior Communities	CA	1,488	1,013	99	376	1,505	1,024	105	376	-17
40	42	Magnolia Manor	GA	1,483	339	335	809	1,483	339	335	809	0
41	36	Loretto	NY	1,475	259	593	623	1,601	259	628	714	-126
42	44	Buckner Retirement Services, Inc.	TX	1,456	857	243	356	1,471	870	315	286	-15
43	46	Presbyterian Homes	IL	1,446	859	224	363	1,446	859	224	363	0
44	49	Mississippi Methodist Senior Services, Inc.	MS	1,442	807	315	320	1,390	805	265	320	52
45	50	WesleyLife	IA	1,431	694	299	438	1,330	695	261	374	101
46	47	Holland Home	MI	1,419	723	455	241	1,419	723	435	261	0
47	48	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	1,410	60	135	1,215	0
48	45	Greencroft Communities	IN	1,406	517	390	499	1,451	530	388	533	-45
49	40	Bethesda Health Group, Inc.	MO	1,369	549	18	802	1,522	627	34	861	-153
50	55	Bethesda Senior Living Communities	CO	1,362	155	1,207	0	1,250	204	1,046	0	112

NR indicates that organization was not among largest 100 in the 2013 report

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2012 to 2013
				2013 Units				2012 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	43	be.group	CA	1,359	859	268	232	1,473	851	390	232	-114
52	69	Presbyterian Villages of Michigan	MI	1,318	901	239	178	1,052	588	286	178	266
53	51	Baptist Village Communities	OK	1,280	774	181	325	1,276	770	181	325	4
54	54	Lutheran Life Communities	IL	1,279	233	299	747	1,256	233	283	740	23
55	53	Masonicare, Inc.	CT	1,266	458	272	536	1,266	458	272	536	0
56	52	Lutheran Services Carolinas	NC	1,262	257	273	732	1,274	257	285	732	-12
57	56	Friendship Senior Options	IL	1,259	785	183	291	1,239	806	185	248	20
58	77	SantaFe Senior Living	FL	1,228	876	252	100	976	731	185	60	252
59	57	Phoebe Ministries	PA	1,216	378	171	667	1,218	380	171	667	-2
60	59	Virginia United Methodist Homes, Inc.	VA	1,213	516	424	273	1,209	628	324	257	4
61	58	Virginia Baptist Homes	VA	1,204	760	225	219	1,211	764	227	220	-7
62	60	American Baptist Homes of the Midwest	MN	1,200	374	209	617	1,200	374	209	617	0
63	61	Lutheran SeniorLife	PA	1,173	481	234	458	1,158	373	327	458	15
64	62	EMA	MD	1,156	651	228	277	1,156	651	228	277	0
65	63	Lutheran Social Services of South Central Pennsylvania	PA	1,138	553	251	334	1,150	555	251	344	-12
66	67	Presbyterian SeniorCare	PA	1,114	348	351	415	1,065	359	285	421	49
67	64	Sears Methodist Retirement System, Inc.	TX	1,097	529	136	432	1,097	529	136	432	0
68	66	Northern California Presbyterian Homes and Services, Inc.	CA	1,088	824	123	141	1,089	826	122	141	-1
69	68	United Methodist Homes	NY	1,061	394	241	426	1,059	395	238	426	2
70	71	Walker Methodist	MN	1,034	493	165	376	1,034	493	165	376	0
71	70	Lutheran Homes of South Carolina	SC	1,029	386	327	316	1,038	386	328	324	-9
72	72	United Methodist Homes of New Jersey	NJ	1,026	88	686	252	1,028	88	688	252	-2
73	73	Wesley Enhanced Living	PA	1,022	501	221	300	1,016	502	214	300	6
74	75	Elant	NY	995	148	144	703	995	148	144	703	0
75	74	Air Force Villages, Inc.	TX	993	728	129	136	1,013	748	129	136	-20

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units 4-1a RANK, DETAILED BY UNITS (2013 VS. 2012)

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2012 to 2013
				2013 Units				2012 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	76	United Church Homes, Inc.	OH	983	110	205	668	977	177	136	664	6
77	79	Presby's Inspired Life	PA	965	491	214	260	947	469	218	260	18
78	78	The Presbyterian Homes, Inc.	NC	958	636	133	189	956	634	133	189	2
79	80	United Church Homes and Services	NC	948	530	74	344	944	526	90	328	4
80	83	United Methodist Memorial Home	IN	946	199	472	275	917	189	469	259	29
81	81	The United Methodist Retirement Homes, Inc.	NC	933	626	105	202	937	630	101	206	-4
82	82	Menno Haven	PA	920	531	177	212	920	531	177	212	0
83	84	Mather LifeWays	IL	900	623	46	231	900	623	46	231	0
84	87	Cedar Community	WI	895	425	241	229	881	431	203	247	14
85	Second 25	Liberty Lutheran Services	PA	893	384	301	208	623	257	185	181	270
86	85	VMP	WI	889	447	205	237	889	447	205	237	0
87	86	Oakwood Lutheran Senior Ministries	WI	885	588	160	137	885	588	160	137	0
88	89	Westminster Ingleside Retirement Communities	DC	877	607	124	146	878	608	124	146	-1
89	91	St. Ann's Community	NY	863	246	75	542	863	246	75	542	0
90	90	Presbyterian Communities and Services	TX	856	329	139	388	864	334	139	391	-8
91	93	Living Branches	PA	852	463	246	143	852	463	246	143	0
92	94	Presbyterian Communities of South Carolina	SC	850	270	314	266	848	292	290	266	2
93	92	Simpson Senior Services	PA	839	494	153	192	858	494	172	192	-19
94	96	Goodwin House Incorporated	VA	832	585	99	148	838	590	99	149	-6
95	65	Los Angeles Jewish Home	CA	831	50	271	510	1,092	159	423	510	-261
96	Second 25	Sunset Retirement Communities and Services	MI	822	491	201	130	633	315	188	130	189
97	95	LutherCare	PA	810	473	126	211	840	483	128	229	-30
98	97	Givens Estates	NC	802	581	77	144	834	599	91	144	-32
99	100	Morningside Ministries	TX	789	318	135	336	793	321	136	336	-4
100	First 25	Sunnyside Presbyterian Home, Inc.	VA	780	504	142	134	780	504	142	134	0

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2012 to 2013
				2013 Units				2012 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
101	99	Western Home Communities	IA	779	382	297	100	793	463	230	100	-14
102	First 25	BHI Senior Living, Inc.	IN	769	147	397	225	735	134	376	225	34
103	First 25	United Church of Christ Homes	PA	766	267	124	375	766	267	124	375	0
104	First 25	Methodist Retirement Communities	TX	761	318	229	214	767	319	234	214	-6
105	First 25	Lutheran Social Services of Michigan	MI	757	281	120	356	782	512	142	134	-25
106	88	Christian Care Centers	TX	752	386	138	228	879	402	137	340	-127
107	First 25	Life Enriching Communities	OH	751	458	134	159	744	460	135	149	7
108	First 25	Garden Spot Village	PA	747	542	86	119	747	542	86	119	0
109	First 25	Christian Living Communities	CO	744	413	152	179	666	335	152	179	78
110	First 25	Eventide	MN	742	73	268	401	751	82	268	401	-9
111	First 25	The Ohio Masonic Home	OH	738	343	201	194	738	343	201	194	0
112	First 25	Wellspring Lutheran Services	MI	736	128	224	384	736	128	224	384	0
113	First 25	Luther Manor	WI	732	366	156	210	778	381	174	223	-46
114	First 25	Albright Care Services	PA	723	269	166	288	716	260	166	290	7
115	NR	Landis Communities	PA	718	471	144	103	626	426	97	103	92
116	First 25	Lutheran Homes Society	OH	706	142	171	393	706	154	159	393	0
117	First 25	Saint Therese	MN	693	302	69	322	693	302	69	322	0
118	First 25	Wesley Homes	WA	688	453	87	148	688	453	87	148	0
119	Second 25	Lutheran Life Villages	IN	684	154	127	403	574	156	79	339	110
121	First 25	Messiah Lifeways	PA	680	339	157	184	674	331	159	184	6
120	Second 25	Masonic Homes of Kentucky	KY	680	302	125	253	611	198	21	392	69
122	First 25	Crista Senior Living	WA	680	382	131	167	680	382	131	167	0
123	First 25	Lutheran Social Ministries of New Jersey	NJ	678	281	130	267	673	281	125	267	5
124	First 25	Maple Knoll Communities, Inc.	OH	676	368	90	218	697	369	91	237	-21
125	First 25	Vincentian Collaborative System	PA	675	66	82	527	675	66	82	527	0

NR indicates that organization was not among largest 100 in the 2013 report

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2012 to 2013
				2013 Units				2012 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
126	First 25	LifeStream Complete Senior Living, Inc.	AZ	661	357	144	160	707	377	144	186	-46
127	Second 25	United Methodist Homes	CT	659	90	406	163	659	90	406	163	0
128	Second 25	Church Homes inc.	CT	659	90	406	163	659	90	406	163	0
129	Second 25	National Lutheran Communities & Services	MD	656	397	89	170	463	244	0	219	193
130	First 25	Christian Care Communities, Inc.	KY	653	185	0	468	756	185	103	468	-103
131	Second 25	LindenGrove, Inc.	WI	650	0	189	461	627	0	166	461	23
133	Second 25	The Loomis Communities	MA	635	427	74	134	648	421	93	134	-13
132	Second 25	Asbury Inc.	TN	635	177	126	332	628	170	126	332	7
134	Second 25	Heritage Ministries	NY	624	156	68	400	533	89	44	400	91
135	Second 25	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	621	272	140	209	0
136	Second 25	Smith Senior Living	IL	615	325	144	146	615	325	144	146	0
137	Second 25	Presbyterian Retirement Communities Northwest	WA	591	397	132	62	591	397	116	78	0
138	Second 25	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	587	238	229	120	0
139	Second 25	Lutheran Social Services of the South, Inc.	TX	586	339	149	98	573	324	149	100	13
140	NR	Sholom Community Alliance	MN	583	153	143	287	567	153	143	271	16
141	Second 25	Mercy Community Health	CT	581	205	120	256	581	205	120	256	0
142	Second 25	Baptist Homes Society	PA	580	257	134	189	580	257	134	189	0
143	Second 25	Friends Homes, Inc.	NC	577	368	100	109	579	370	100	109	-2
144	First 25	St. John's Lutheran Ministries	MT	576	144	246	186	736	257	266	213	-160
145	Second 25	Porter Hills Retirement Communities and Services	MI	573	356	116	101	573	356	116	101	0
146	Second 25	United Methodist Retirement Communities, Inc.	MI	564	279	200	85	409	174	150	85	155
147	Second 25	Masonic Homes of California	CA	562	302	135	125	562	302	135	125	0
148	Second 25	Baptist Life Communities	KY	560	218	75	267	560	218	75	267	0
149	Second 25	Medford Leas	NJ	552	410	75	67	563	417	79	67	-11
150	Second 25	Life Care Pastoral Services	FL	550	384	76	90	544	386	68	90	6

Note: The 2013 report ranked only 100 largest systems whereby 2014 ranks the largest 150 systems

NR indicates that organization was not among largest 100 in the 2013 report

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units

#### 4-1b SUMMARY OF UNIT MIX (BY LARGEST 10, 25, 50, 100 & TOTAL)

Largest	ILU	ALU	NCB	Total Units	% as total of LZ 150 units
10	44,401	9,906	19,771	74,078	31.5%
25	63,897	17,097	30,915	111,909	47.6%
50	78,821	27,115	45,285	151,221	64.3%
100	103,117	37,782	61,250	202,149	85.9%
150	117,276	45,503	72,515	235,294	100.0%

Largest	2014 Total Units	2013 Total Units	Change in total units	Percent change in total units
10	74,078	72,736	1,342	1.8%
25	111,909	111,237	672	0.6%
50	151,221	150,985	236	0.2%
100	202,149	201,305	844	0.4%
150	235,294	N/A	N/A	N/A

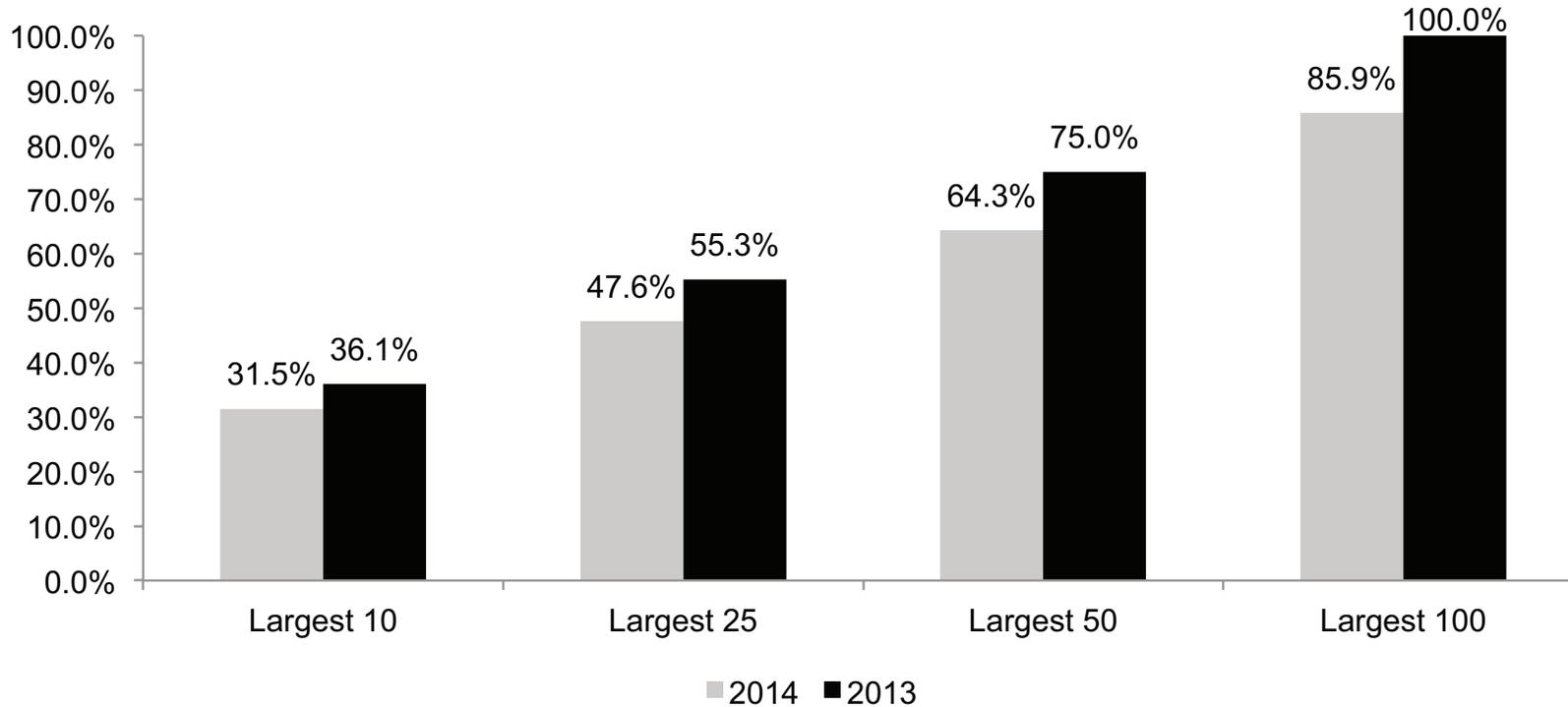
Analysis of Unit Mix for Each Year's Respective LZ 150 Listing*				
<b>2012 LZ 150</b>				
2011 avg units/system	1,024.2	371.2	612.2	2,007.5
% of total	51.0%	18.5%	30.5%	100.0%
<b>2013 LZ 150</b>				
2012 avg units/system	1,016.6	368.7	618.4	2,003.7
% of total	50.7%	18.4%	30.9%	100.0%
<b>2014 LZ 150</b>				
2013 avg units/system	781.8	303.4	483.4	1,575.2
% of total	49.8%	19.3%	30.8%	100.0%

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

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units

4-1c PERCENTAGE OF TOTAL UNITS OWNED (BY LARGEST 10, 25, 50, 100 & 150)

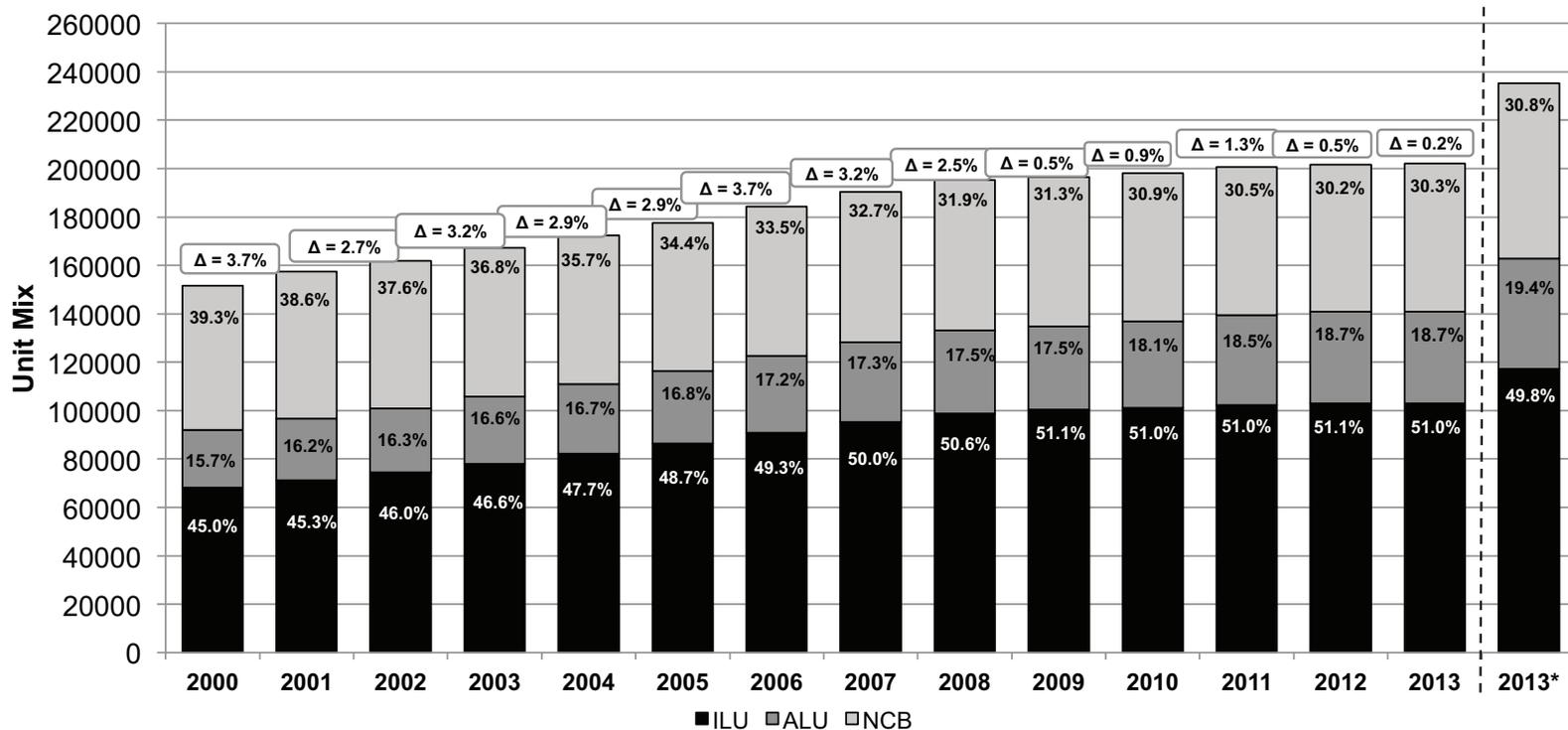


*\*Note change from 100 to 150 with the 2014 publication*

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units

4-1d TOTAL UNIT MIX BY YEAR, BY TOTAL UNITS, 2000 THROUGH 2013 FOR 2014 LZ 150

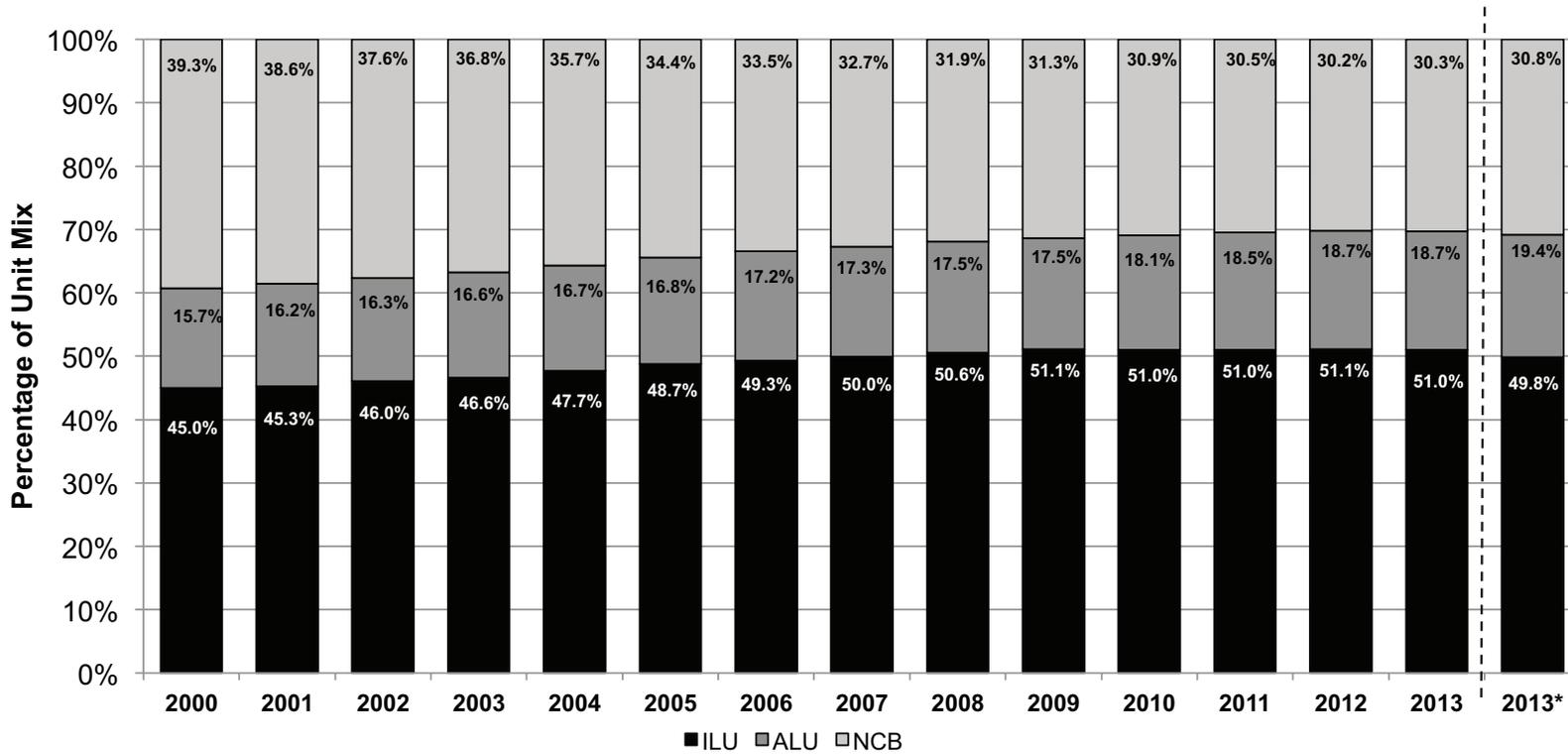


\*Reflects change from 100 to 150 with the 2014 publication

# 4-1 2014 LeadingAge Ziegler 150

## Organizational Characteristics: Units

4-1e TOTAL UNIT MIX BY YEAR, BY PERCENT, 2000 THROUGH 2013 FOR 2014 LZ 150

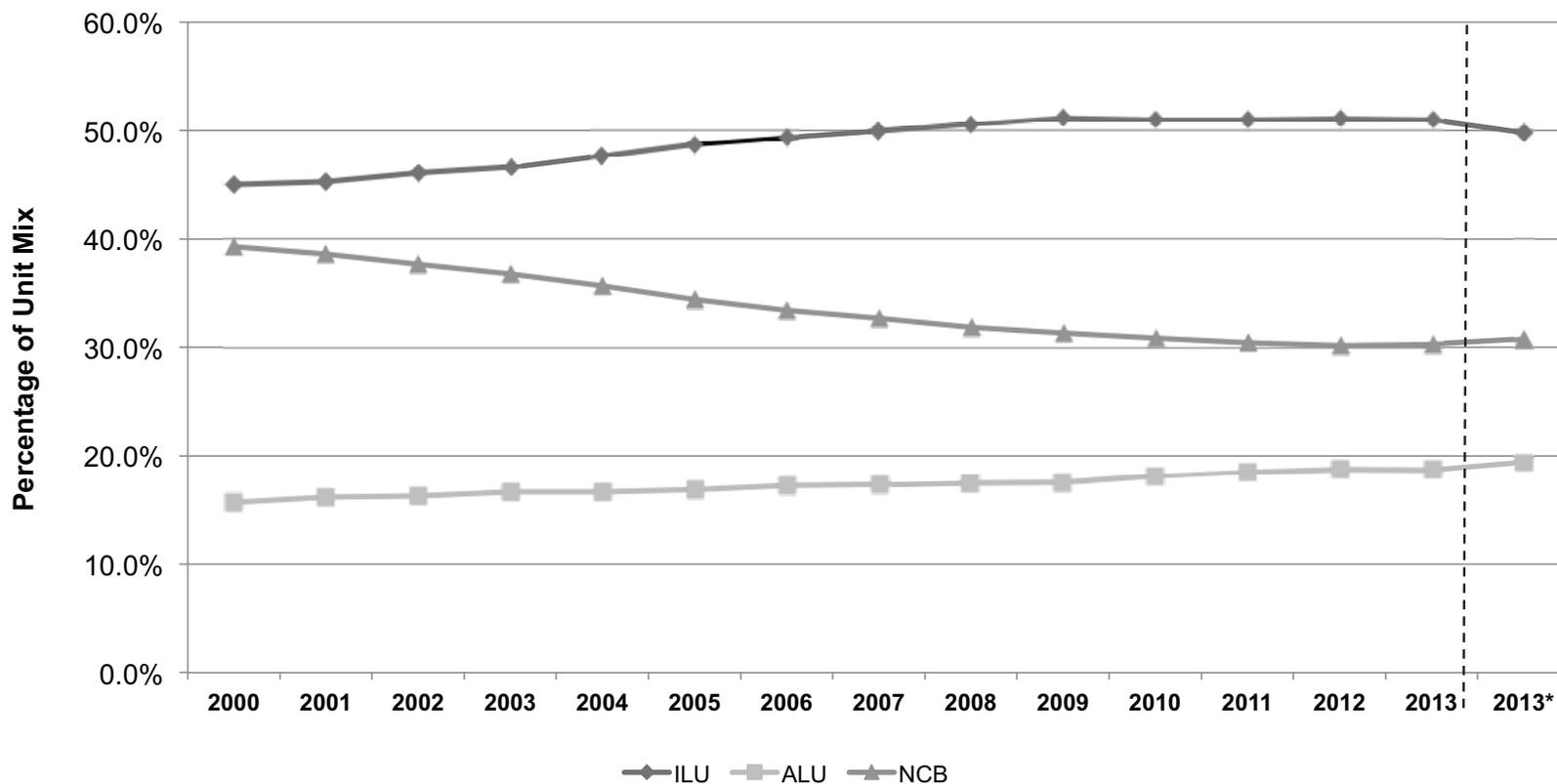


\*Reflects change from 100 to 150 with the 2014 publication

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units

4-1f YEAR OVER YEAR CHANGE IN PERCENTAGE OF UNIT MIX, 2000 THROUGH 2013 FOR 2014 LZ 150

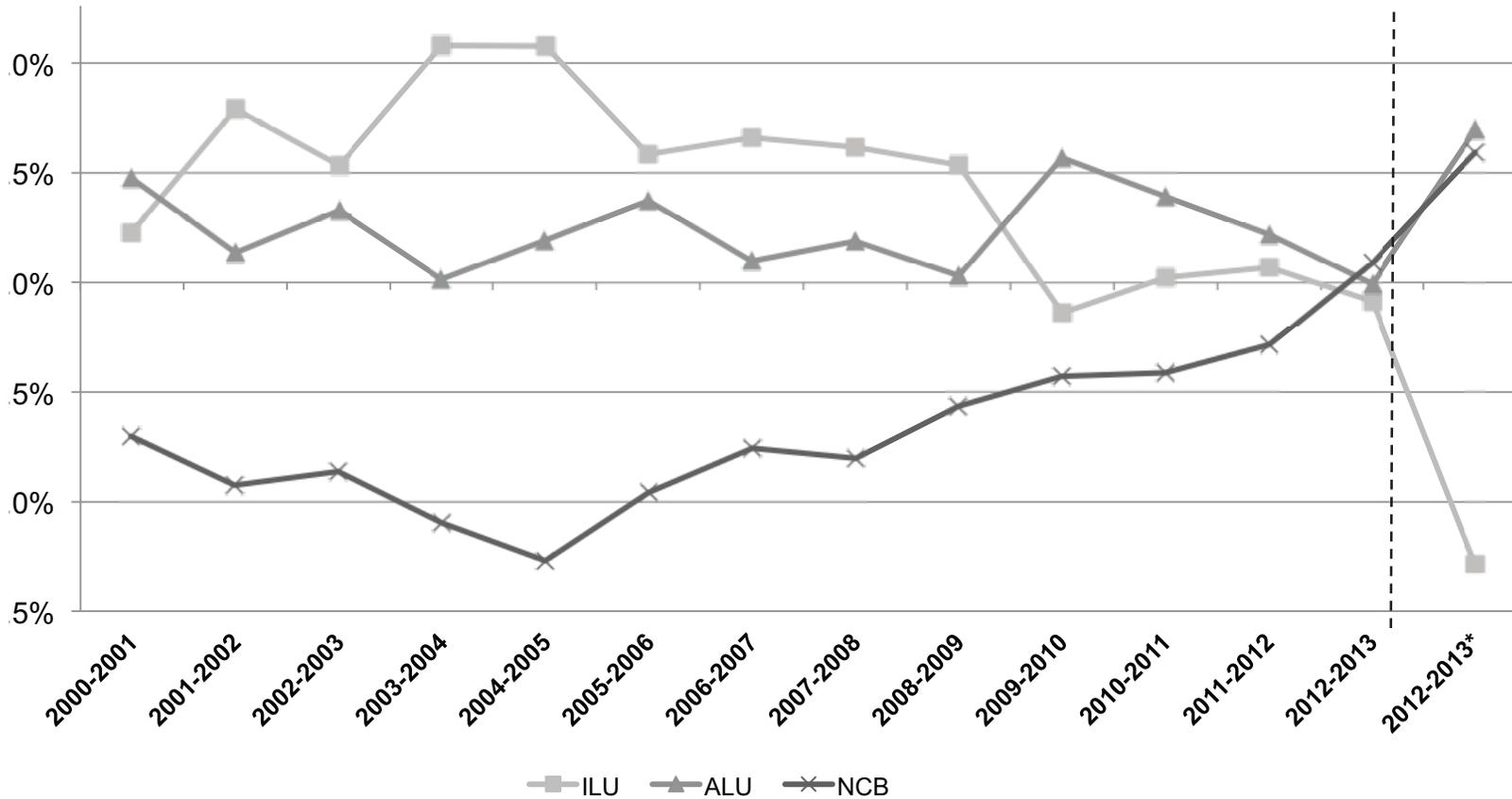


\*Reflects change from 100 to 150 with the 2014 publication

# 4-1 2014 LeadingAge Ziegler 150

## Organizational Characteristics: Units

4-1g PERCENTAGE CHANGE IN UNIT MIX, 2000 THROUGH 2013 FOR 2014 LZ 150

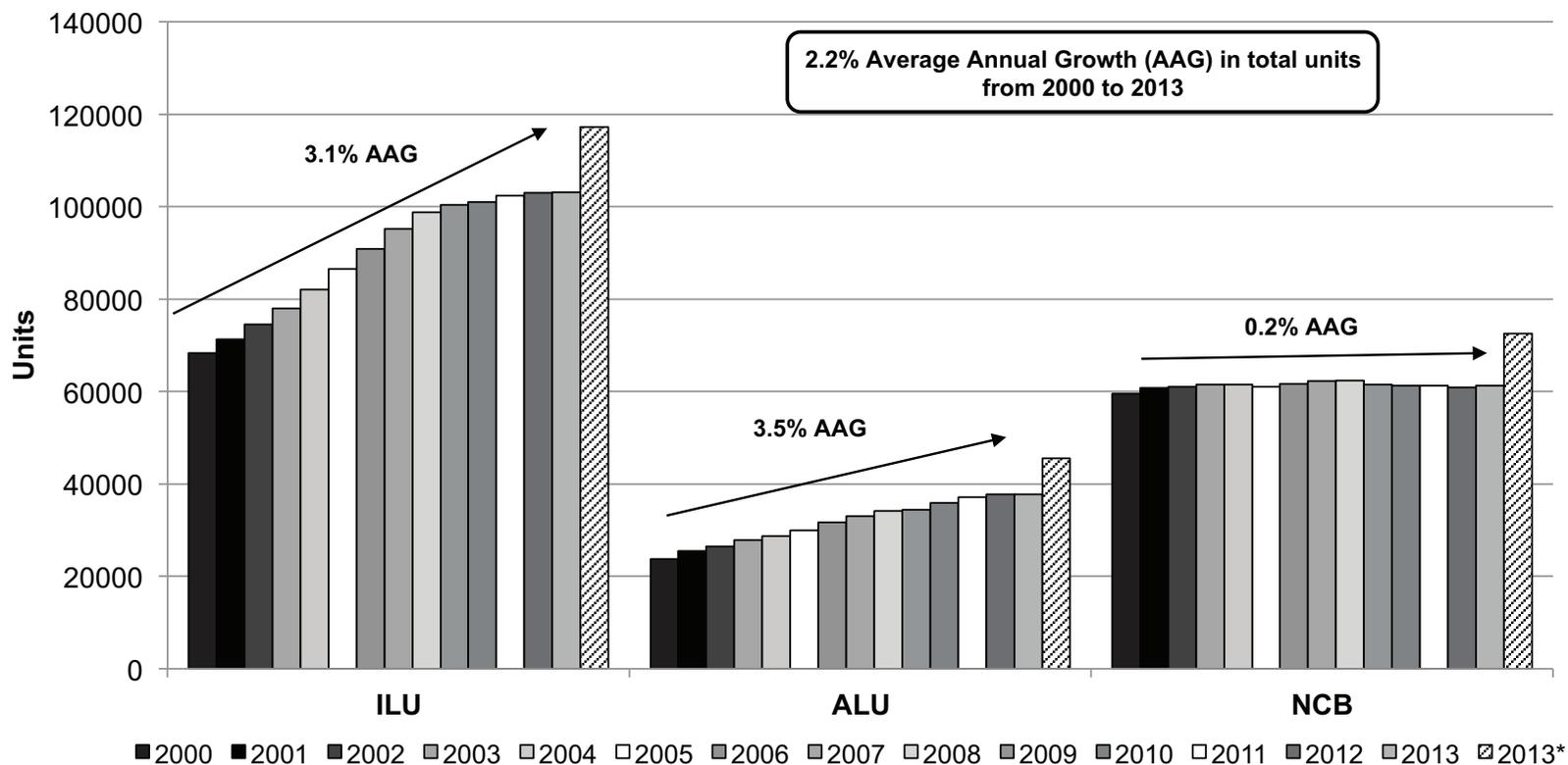


\*Reflects change from 100 to 150 with the 2014 publication

## 4-1 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Units

4-1h UNIT TYPE COMPARISON, BY UNITS, 2000 THROUGH 2013 FOR 2014 LZ 150



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

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2012 to 2013
				2013 Communities					2012 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
1	1	Evangelical Lutheran Good Samaritan Society	SD	173	77	8	35	53	180	78	9	36	57	-7
2	2	National Senior Campuses	MD	15	15	0	0	0	15	15	0	0	0	0
3	3	ACTS Retirement Services, Inc.	PA	23	23	0	0	0	23	23	0	0	0	0
4	4	Presbyterian Homes and Services	MN	37	12	21	2	2	39	13	21	3	2	-2
5	5	Covenant Retirement Communities, Inc.	IL	15	13	1	1	0	14	12	1	1	0	1
6	6	Retirement Housing Foundation	CA	18	9	8	1	0	18	9	8	1	0	0
7	7	Lifespace Communities, Inc.	IA	12	12	0	0	0	12	12	0	0	0	0
8	8	The Kendal Corporation	PA	15	13	2	0	0	15	13	2	0	0	0
9	10	Lutheran Senior Services	MO	11	9	0	1	1	11	9	0	1	1	0
10	9	Westminster Communities of Florida	FL	9	9	0	0	0	10	8	2	0	0	-1
11	11	Presbyterian Senior Living	PA	20	12	5	2	1	20	12	5	2	1	0
12	12	Ohio Presbyterian Retirement Services	OH	11	11	0	0	0	11	9	2	0	0	0
13	13	Cornerstone Affiliates	CA	11	11	0	0	0	11	11	0	0	0	0
14	17	Front Porch Communities and Services	CA	10	5	5	0	0	10	8	2	0	0	0
15	14	Pacific Retirement Services	OR	9	8	1	0	0	9	8	1	0	0	0
16	15	Asbury Communities	MD	5	5	0	0	0	5	5	0	0	0	0
17	16	Christian Homes, Inc.	IL	13	13	0	0	0	14	13	0	0	1	-1
18	20	Presbyterian Manors of Mid-America, Inc.	KS	18	16	0	1	1	18	16	0	1	1	0
19	18	Ecumen	MN	36	0	4	24	8	40	0	4	27	9	-4
20	22	Masonic Villages	PA	5	3	1	1	0	5	3	1	1	0	0
21	19	Volunteers of America	VA	24	4	3	7	10	25	5	2	8	10	-1
22	21	Diakon Lutheran Social Ministries	PA	9	9	0	0	0	11	8	0	3	0	-2
23	23	Shell Point	FL	2	2	0	0	0	2	2	0	0	0	0
24	24	Willow Valley Communities	PA	3	3	0	0	0	3	3	0	0	0	0
25	35	Springpoint Senior Living, Inc.	NJ	6	6	0	0	0	5	5	0	0	0	1

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2012 to 2013
				2013 Communities					2012 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
26	26	Franciscan Communities, Inc.	IL	8	4	1	3	0	8	4	1	3	0	0
27	27	Augustana Care	MN	18	0	0	12	6	18	0	6	6	6	0
28	28	Otterbein Senior Lifestyle Choices	OH	10	5	0	0	5	10	5	0	0	5	0
29	29	Christian Care Companies	AZ	4	1	3	0	0	4	1	3	0	0	0
30	38	Senior Quality Lifestyles Corporation	TX	6	6	0	0	0	5	5	0	0	0	1
31	30	Concordia Lutheran Ministries	PA	10	4	0	6	0	10	3	0	7	0	0
32	NR	Jewish Home Lifecare	NY	4	0	1	0	3	4	0	1	0	3	0
33	34	Homewood Retirement Centers	MD	5	4	1	0	0	6	6	0	0	0	-1
34	31	National Church Residences	OH	8	5	0	2	1	7	4	0	2	1	1
35	37	Hebrew SeniorLife	MA	4	2	1	0	1	4	2	1	0	1	0
36	33	Elim Care, Inc.	MN	23	0	4	9	10	19	1	2	7	9	4
37	39	Eskaton	CA	13	1	3	6	3	13	1	3	6	3	0
38	25	Providence Life Services	IL	9	1	4	1	3	11	1	5	1	4	-2
39	41	Episcopal Senior Communities	CA	6	6	0	0	0	7	6	0	0	1	-1
40	42	Magnolia Manor	GA	8	2	4	1	1	8	2	4	1	1	0
41	36	Loretto	NY	8	1	2	4	1	8	1	2	4	1	0
42	44	Buckner Retirement Services, Inc.	TX	7	5	2	0	0	7	5	2	0	0	0
43	46	Presbyterian Homes	IL	5	3	1	1	0	4	4	0	0	0	1
44	49	Mississippi Methodist Senior Services, Inc.	MS	12	2	8	0	2	11	2	7	0	2	1
45	50	WesleyLife	IA	7	7	0	0	0	7	7	0	0	0	0
46	47	Holland Home	MI	4	3	0	0	1	4	2	0	1	1	0
47	48	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	6	2	0	0	4	6	2	0	0	4	0
48	45	Greencroft Communities	IN	6	6	0	0	0	6	6	0	0	0	0
49	40	Bethesda Health Group, Inc.	MO	7	1	4	0	2	8	2	4	0	2	-1
50	55	Bethesda Senior Living Communities	CO	18	0	1	17	0	14	0	3	11	0	4

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2012 to 2013
				2013 Communities					2012 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
51	43	be.group	CA	7	6	0	1	0	9	6	0	3	0	-2
52	69	Presbyterian Villages of Michigan	MI	8	2	6	0	0	8	2	6	0	0	0
53	51	Baptist Village Communities	OK	8	3	5	0	0	8	3	5	0	0	0
54	54	Lutheran Life Communities	IL	5	5	0	0	0	5	3	0	2	0	0
55	53	Masonicare, Inc.	CT	8	1	3	2	2	5	1	1	1	2	3
56	52	Lutheran Services Carolinas	NC	8	1	1	1	5	8	1	1	1	5	0
57	56	Friendship Senior Options	IL	2	2	0	0	0	2	2	0	0	0	0
58	77	SantaFe Senior Living	FL	3	3	0	0	0	3	1	2	0	0	0
59	57	Phoebe Ministries	PA	4	4	0	0	0	4	3	0	0	1	0
60	59	Virginia United Methodist Homes, Inc.	VA	7	6	0	1	0	7	6	0	1	0	0
61	58	Virginia Baptist Homes	VA	4	4	0	0	0	4	4	0	0	0	0
62	60	American Baptist Homes of the Midwest	MN	8	4	1	2	1	8	4	1	2	1	0
63	61	Lutheran SeniorLife	PA	7	2	5	0	0	7	2	5	0	0	0
64	62	EMA	MD	4	3	0	1	0	4	3	0	1	0	0
65	63	Lutheran Social Services of South Central Pennsylvania	PA	6	6	0	0	0	6	6	0	0	0	0
66	67	Presbyterian SeniorCare	PA	3	3	0	0	0	3	3	0	0	0	0
67	64	Sears Methodist Retirement System, Inc.	TX	6	5	0	0	1	6	5	0	0	1	0
68	66	Northern California Presbyterian Homes and Services, Inc.	CA	5	3	1	1	0	4	3	1	0	0	1
69	68	United Methodist Homes	NY	4	3	0	1	0	4	3	0	1	0	0
70	71	Walker Methodist	MN	6	1	4	1	0	6	1	4	1	0	0
71	70	Lutheran Homes of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
72	72	United Methodist Homes of New Jersey	NJ	5	1	0	4	0	5	1	0	4	0	0
73	73	Wesley Enhanced Living	PA	6	5	1	0	0	6	5	0	1	0	0
74	75	Elant	NY	6	1	0	1	4	6	1	0	1	4	0
75	74	Air Force Villages, Inc.	TX	2	2	0	0	0	3	2	0	1	0	-1

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2012 to 2013
				2013 Communities					2012 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
76	76	United Church Homes, Inc.	OH	6	4	0	0	2	6	4	0	0	2	0
77	79	Presby's Inspired Life	PA	4	2	0	1	1	4	2	1	0	1	0
78	78	The Presbyterian Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
79	80	United Church Homes and Services	NC	3	3	0	0	0	3	3	0	0	0	0
80	83	United Methodist Memorial Home	IN	3	3	0	0	0	4	3	0	1	0	-1
81	81	The United Methodist Retirement Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
82	82	Menno Haven	PA	3	2	1	0	0	3	2	1	0	0	0
83	84	Mather LifeWays	IL	4	2	1	0	1	5	2	2	0	1	-1
84	87	Cedar Community	WI	6	1	2	2	1	5	2	1	1	1	1
85	Second 25	Liberty Lutheran Services	PA	4	3	0	1	0	3	2	0	1	0	1
86	85	VMP	WI	2	2	0	0	0	2	2	0	0	0	0
87	86	Oakwood Lutheran Senior Ministries	WI	2	2	0	0	0	2	2	0	0	0	0
88	89	Westminster Ingleside Retirement Communities	DC	3	3	0	0	0	3	3	0	0	0	0
89	91	St. Ann's Community	NY	2	2	0	0	0	2	2	0	0	0	0
90	90	Presbyterian Communities and Services	TX	2	2	0	0	0	2	2	0	0	0	0
91	93	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
92	94	Presbyterian Communities of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
93	92	Simpson Senior Services	PA	3	3	0	0	0	3	3	0	0	0	0
94	96	Goodwin House Incorporated	VA	2	2	0	0	0	2	2	0	0	0	0
95	65	Los Angeles Jewish Home	CA	3	2	0	0	1	3	1	2	0	0	0
96	Second 25	Sunset Retirement Communities and Services	MI	4	1	1	1	1	3	0	2	0	1	1
97	95	LutherCare	PA	3	2	0	0	1	3	1	1	0	1	0
98	97	Givens Estates	NC	2	2	0	0	0	2	2	0	0	0	0
99	100	Morningside Ministries	TX	3	3	0	0	0	3	3	0	0	0	0
100	First 25	Sunnyside Presbyterian Home, Inc.	VA	12	3	3	3	3	12	3	3	3	3	0

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2012 to 2013
				2013 Communities					2012 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
101	99	Western Home Communities	IA	2	1	1	0	0	3	1	2	0	0	-1
102	First 25	BHI Senior Living, Inc.	IN	3	3	0	0	0	3	3	0	0	0	0
103	First 25	United Church of Christ Homes	PA	6	4	2	0	0	6	4	2	0	0	0
104	First 25	Methodist Retirement Communities	TX	4	4	0	0	0	5	4	0	0	1	-1
105	First 25	Lutheran Social Services of Michigan	MI	5	1	2	0	2	3	3	0	0	0	2
106	88	Christian Care Centers	TX	3	3	0	0	0	3	3	0	0	0	0
107	First 25	Life Enriching Communities	OH	2	2	0	0	0	2	2	0	0	0	0
108	First 25	Garden Spot Village	PA	2	1	0	0	1	2	1	0	0	1	0
109	First 25	Christian Living Communities	CO	3	3	0	0	0	3	3	0	0	0	0
110	First 25	Eventide	MN	7	0	1	3	3	4	2	0	1	1	3
111	First 25	The Ohio Masonic Home	OH	3	2	1	0	0	3	2	1	0	0	0
112	First 25	Wellspring Lutheran Services	MI	10	1	3	2	4	10	1	3	2	4	0
113	First 25	Luther Manor	WI	2	1	0	1	0	2	1	0	1	0	0
114	First 25	Albright Care Services	PA	2	2	0	0	0	2	2	0	0	0	0
115	NR	Landis Communities	PA	3	1	1	0	1	1	1	0	0	0	2
116	First 25	Lutheran Homes Society	OH	5	2	1	0	2	5	2	1	0	2	0
117	First 25	Saint Therese	MN	3	2	0	1	0	3	2	0	1	0	0
118	First 25	Wesley Homes	WA	2	2	0	0	0	2	2	0	0	0	0
119	Second 25	Lutheran Life Villages	IN	3	1	0	0	2	2	1	0	0	1	1
120	Second 25	Masonic Homes of Kentucky	KY	3	1	1	1	0	3	1	1	1	0	0
121	First 25	Messiah Lifeways	PA	2	1	1	0	0	2	1	1	0	0	0
122	First 25	Crista Senior Living	WA	2	1	1	0	0	2	1	1	0	0	0
123	First 25	Lutheran Social Ministries of New Jersey	NJ	2	1	0	0	1	2	1	0	0	1	0
124	First 25	Maple Knoll Communities, Inc.	OH	2	2	0	0	0	2	2	0	0	0	0
125	First 25	Vincentian Collaborative System	PA	4	2	0	0	2	4	2	0	0	2	0

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

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

2014 Rank	2013 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2012 to 2013
				2013 Communities					2012 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
126	First 25	LifeStream Complete Senior Living, Inc.	AZ	8	0	3	3	2	4	1	2	0	1	4
127	Second 25	United Methodist Homes	CT	6	1	0	3	2	6	1	0	3	2	0
128	Second 25	Church Homes inc.	CT	6	1	0	3	2	6	1	0	3	2	0
129	Nxt Nxt 50	National Lutheran Communities & Services	MD	3	2	0	1	0	2	1	1	0	0	1
130	First 25	Christian Care Communities, Inc.	KY	6	4	1	0	1	11	4	4	2	1	-5
131	Second 25	LindenGrove, Inc.	WI	9	0	0	5	4	8	0	0	4	4	1
133	Second 25	The Loomis Communities	MA	4	4	0	0	0	4	4	0	0	0	0
132	Second 25	Asbury Inc.	TN	3	2	0	0	1	3	2	0	0	1	0
134	Second 25	Heritage Ministries	NY	8	0	3	2	3	7	0	2	2	3	1
135	Second 25	Baptist Retirement Homes of North Carolina, Inc.	NC	4	2	0	2	0	4	2	0	2	0	0
136	Second 25	Smith Senior Living	IL	2	2	0	0	0	2	2	0	0	0	0
137	Second 25	Presbyterian Retirement Communities Northwest	WA	3	3	0	0	0	3	2	1	0	0	0
138	Second 25	Shepherd of the Valley Lutheran Retirement Services	OH	4	2	1	0	1	4	2	1	0	1	0
139	Second 25	Lutheran Social Services of the South, Inc.	TX	4	2	1	1	0	4	2	1	1	0	0
140	NR	Sholom Community Alliance	MN	5	0	1	2	2	5	0	1	2	2	0
141	Second 25	Mercy Community Health	CT	2	1	0	0	1	2	1	0	0	1	0
142	Second 25	Baptist Homes Society	PA	2	1	0	1	0	2	1	0	1	0	0
143	Second 25	Friends Homes, Inc.	NC	2	2	0	0	0	2	2	0	0	0	0
144	First 25	St. John's Lutheran Ministries	MT	4	3	0	1	0	2	2	0	0	0	2
145	Second 25	Porter Hills Retirement Communities and Services	MI	3	1	1	1	0	3	1	1	1	0	0
146	Nxt Nxt 50	United Methodist Retirement Communities, Inc.	MI	3	2	1	0	0	2	1	1	0	0	1
147	Second 25	Masonic Homes of California	CA	3	3	0	0	0	3	3	0	0	0	0
148	Second 25	Baptist Life Communities	KY	4	1	2	0	1	4	1	2	0	1	0
149	Second 25	Medford Leas	NJ	2	1	1	0	0	2	1	1	0	0	0
150	Second 25	Life Care Pastoral Services	FL	2	2	0	0	0	2	2	0	0	0	0
		<b>TOTAL COMMUNITIES</b>		<b>1140</b>	<b>600</b>	<b>164</b>	<b>195</b>	<b>181</b>	<b>1,136</b>	<b>594</b>	<b>173</b>	<b>187</b>	<b>182</b>	<b>4</b>

Note: The 2013 report ranked only 100 largest systems whereby 2014 ranks the largest 150 systems

NR indicates that organization was not among largest 100 in the 2013 report

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

#### 4-2b SUMMARY OF COMMUNITY MIX (BY LARGEST 10, 25, 50, 100 & TOTAL)

Largest	CCRC	IL	AL	NH	ALL	% as total of LZ 150
10	191	41	40	56	328	28%
25	300	59	75	76	510	44%
50	370	101	141	120	732	63%
100	512	138	167	146	963	83%
150	595	174	205	189	1163	100%

Largest	2014 Total Communities	2013 Total Communities	Change in total communities	Percent change in total communities
10	328	336	-8	-2.4%
25	510	526	-16	-3.1%
50	732	735	-3	-0.4%
100	963	954	9	0.9%
150	1,163	1,140	23	2.0%

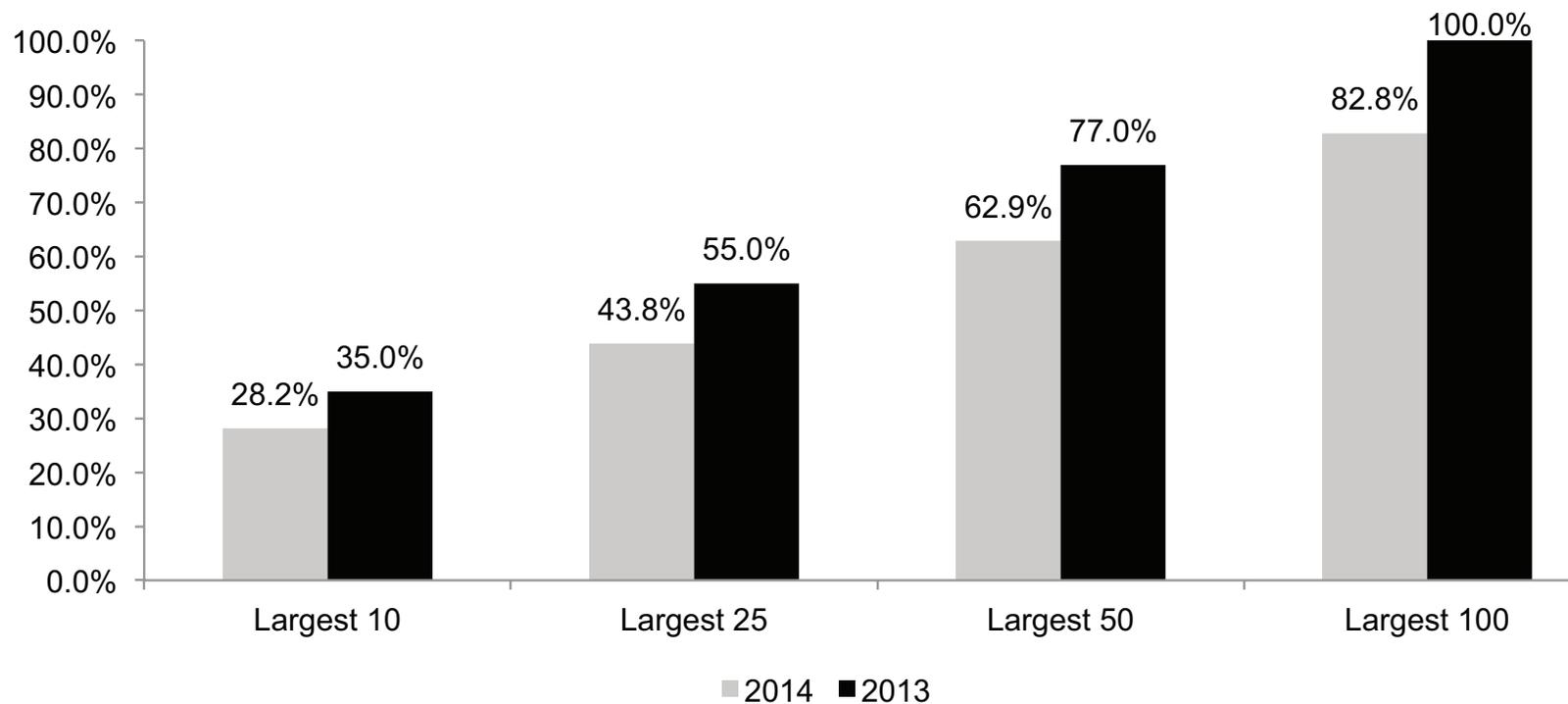
Analysis of Community Mix for Each Year's Respective LZ 150 Listing*					
	CCRC	IL	AL	NH	ALL
<b>2012 LZ 150</b>					
2011 avg communities/system	4.8	1.5	1.6	1.7	9.6
% of total	50.3%	15.4%	16.8%	17.6%	100.0%
<b>2013 LZ 150</b>					
2012 avg communities/system	5.1	1.4	1.6	1.5	9.5
% of total	53.7%	14.9%	16.8%	15.8%	100.0%
<b>2014 LZ 150</b>					
2013 avg communities/system	4.0	1.2	1.4	1.3	7.8
% of total	51.2%	15.1%	17.6%	16.3%	100.0%

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

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

4-2c PERCENTAGE OF TOTAL COMMUNITIES OWNED (BY LARGEST 10, 25, 50, 100 & 150)

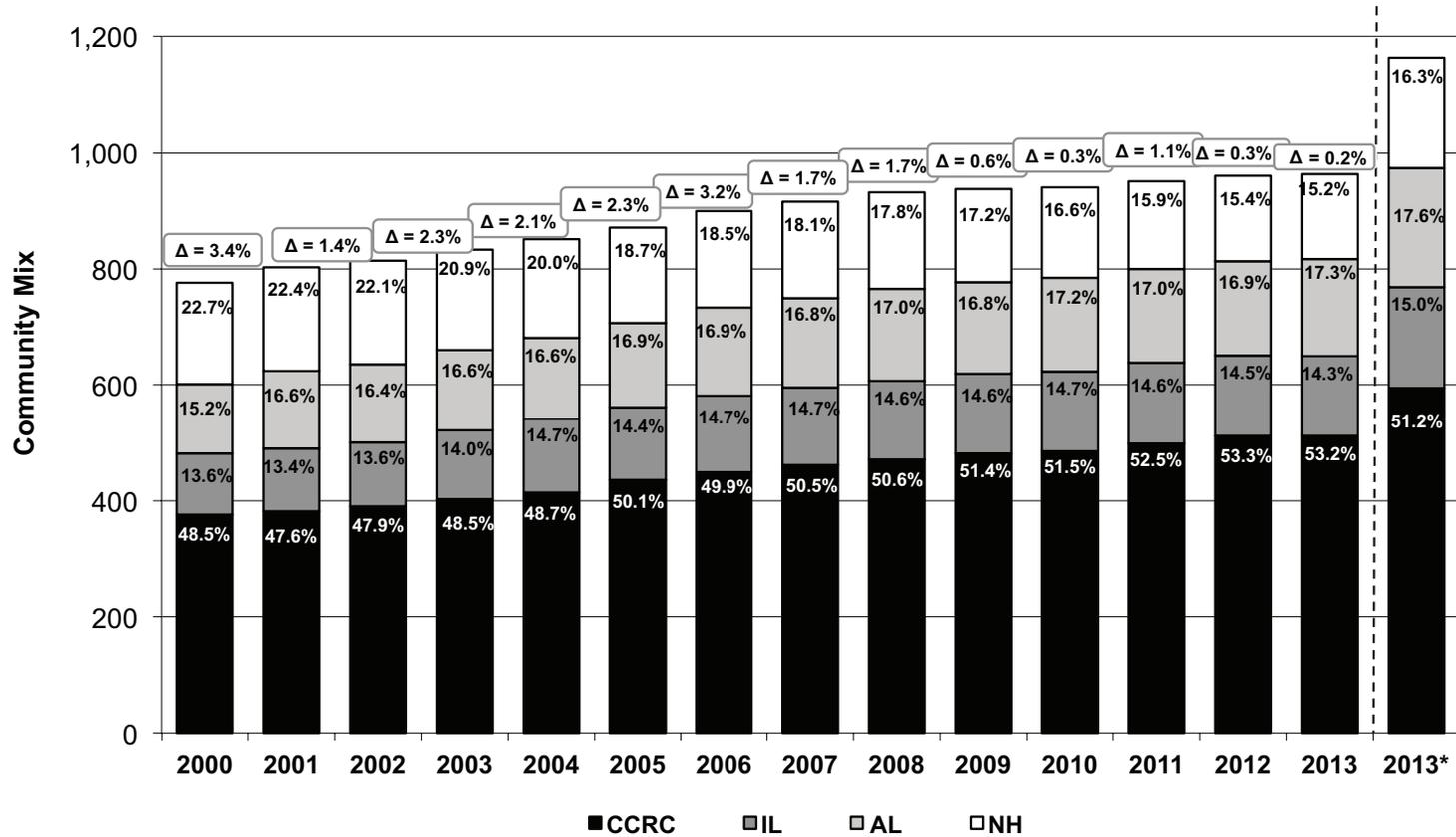


*\*Note change from 100 to 150 with the 2014 publication*

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

4-2d TOTAL COMMUNITY MIX BY YEAR, BY TOTAL COMMUNITIES 2000 THROUGH 2013, FOR 2014 LZ 150

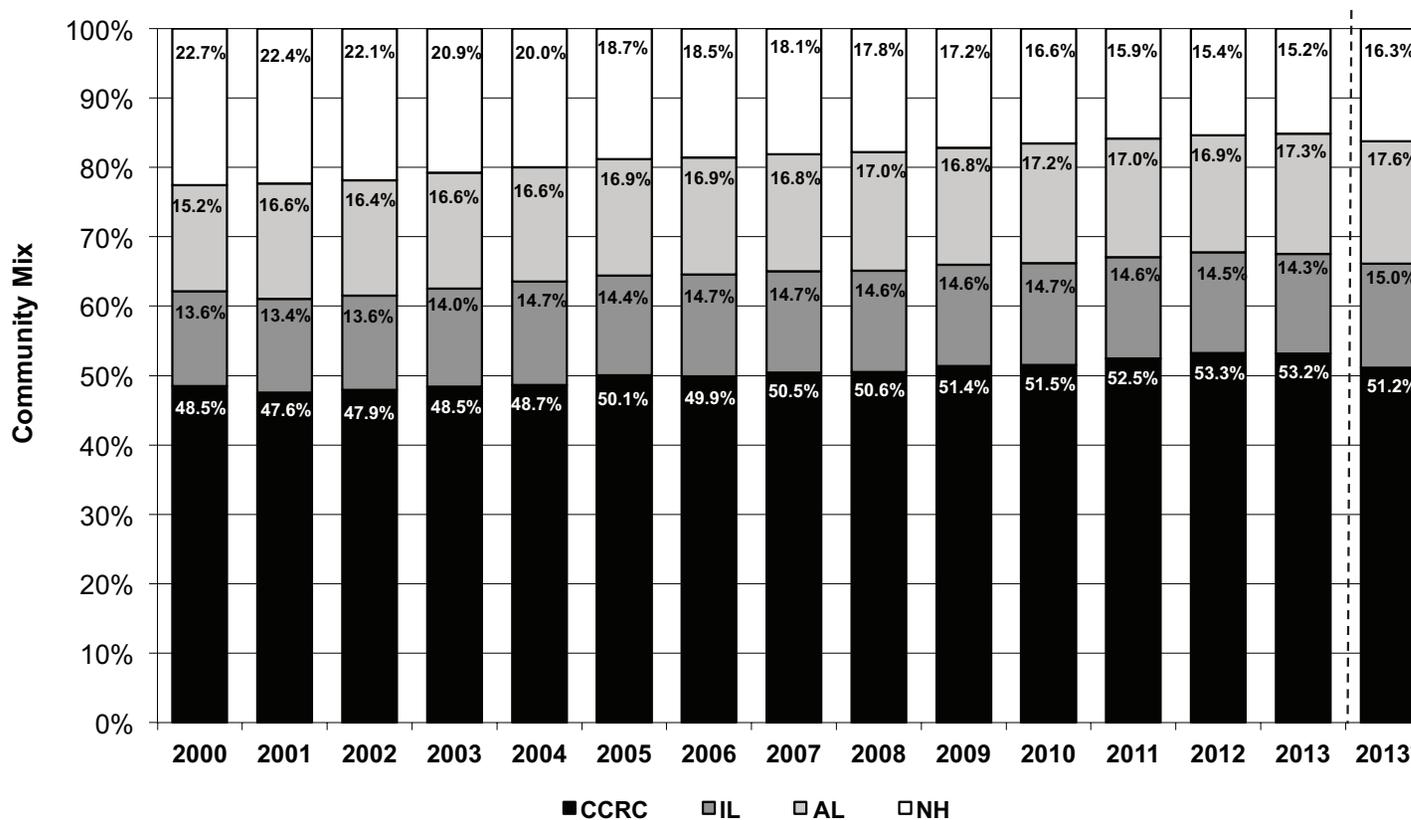


\*Reflects change from 100 to 150 with the 2014 publication

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

4-2e TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2013, FOR 2014 LZ150

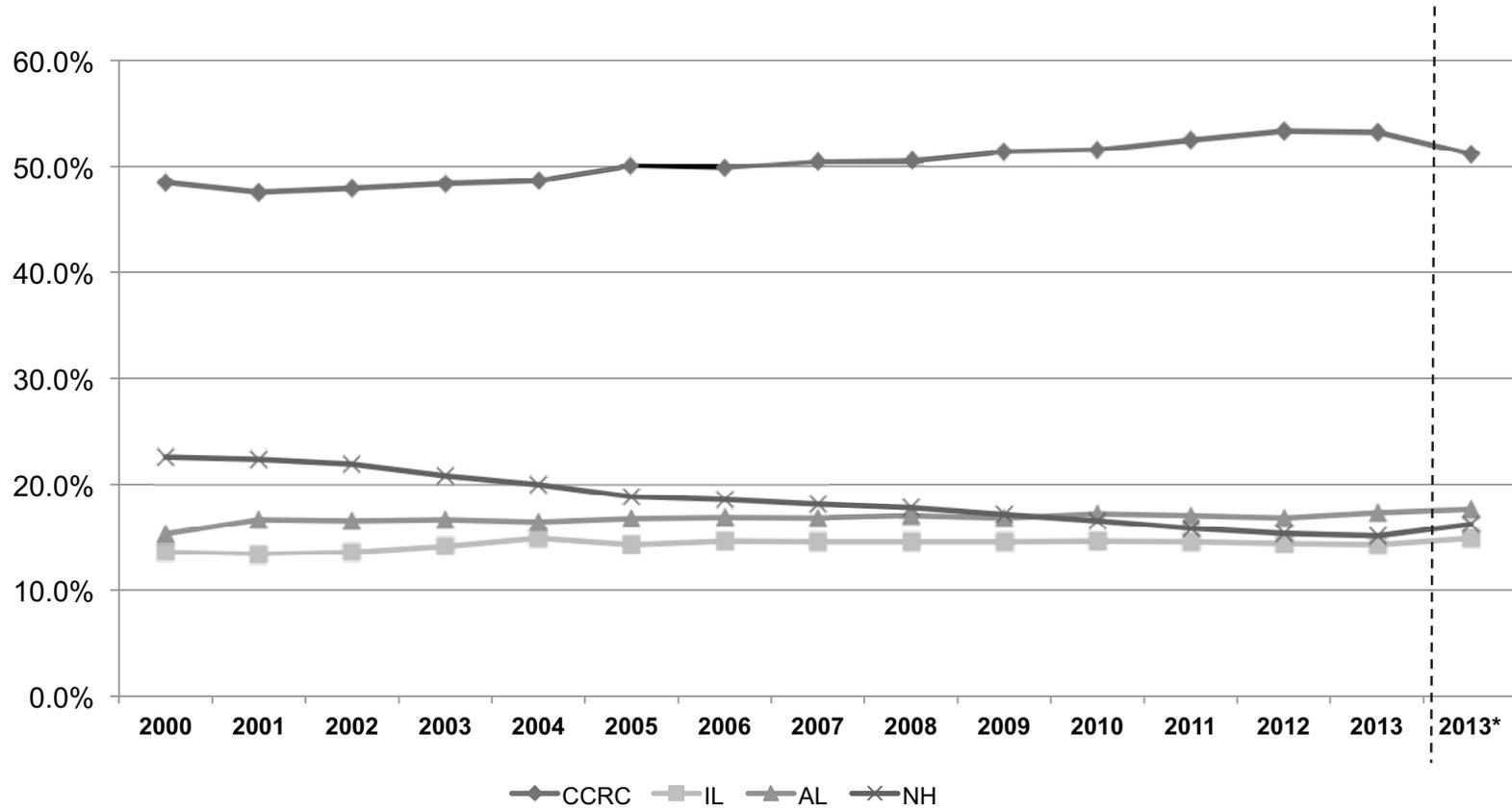


\*Reflects change from 100 to 150 with the 2014 publication

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

4-2f TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2013, FOR 2014 LZ 150

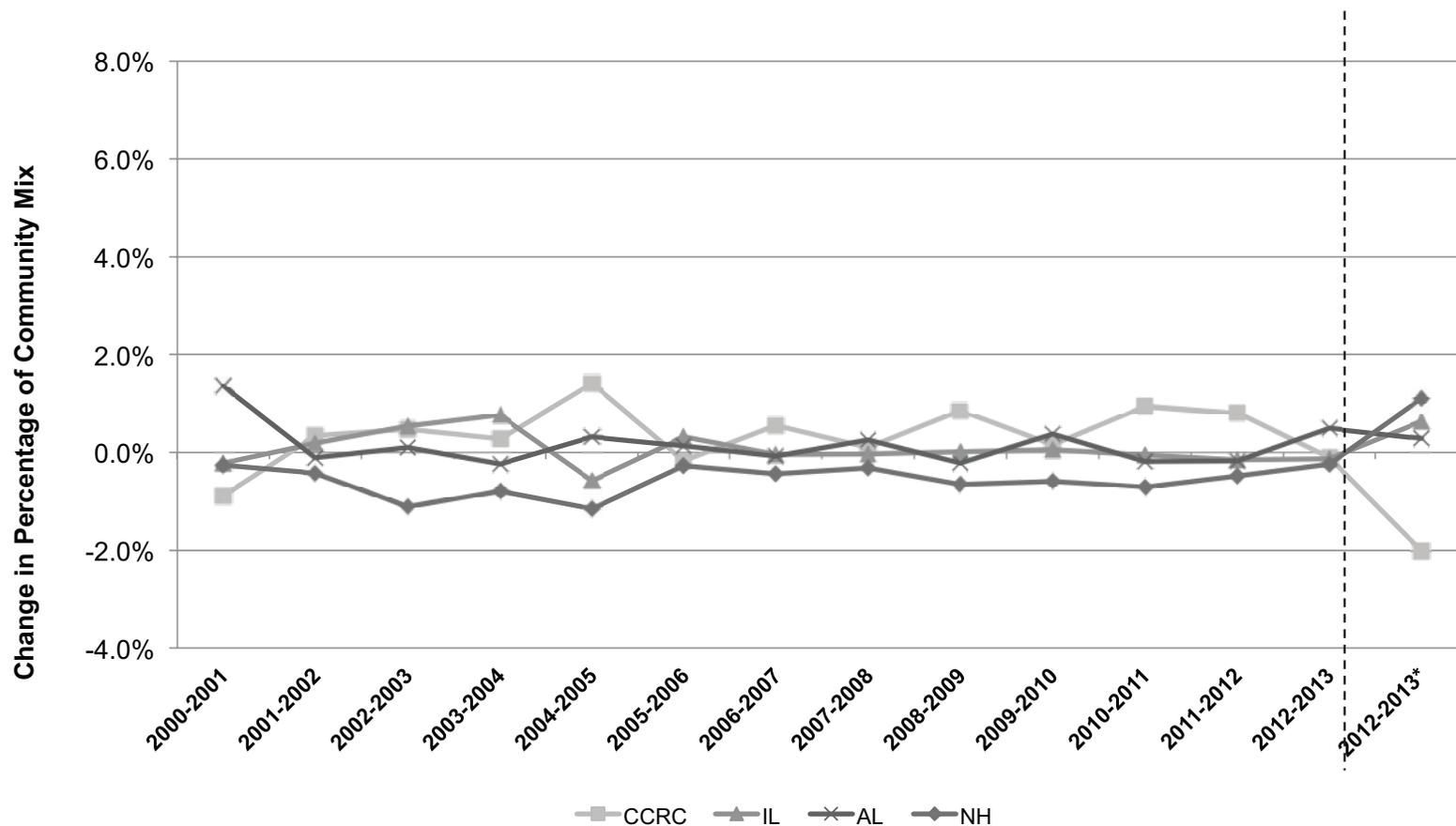


\*Reflects change from 100 to 150 with the 2014 publication

## 4-2 2014 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2g YEAR OVER YEAR CHANGE IN PERCENTAGE OF COMMUNITY MIX  
2000 THROUGH 2013, FOR 2014 LZ 150

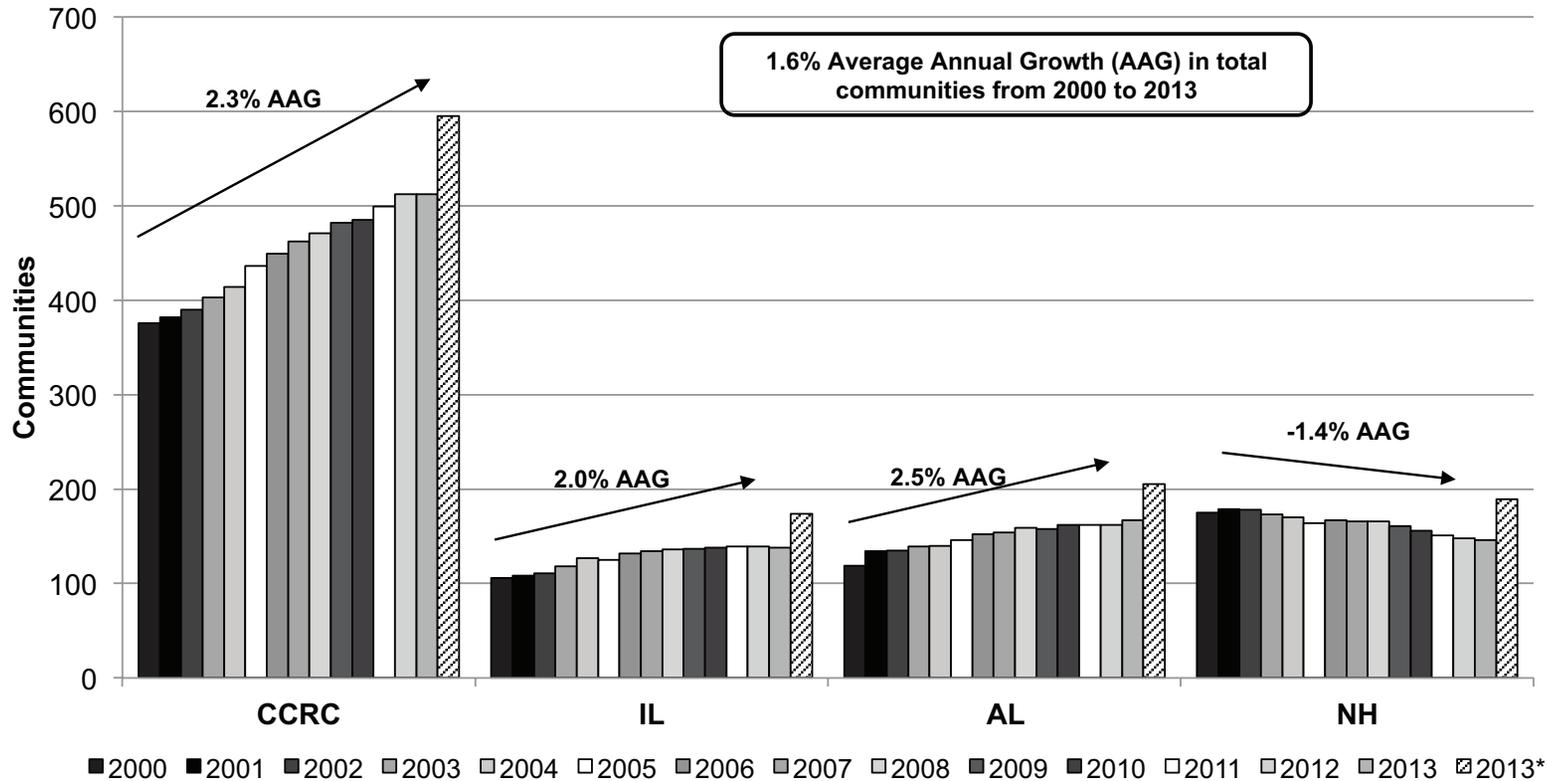


\*Reflects change from 100 to 150 with the 2014 publication

## 4-2 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Communities

4-2h YEAR OVER YEAR CHANGE IN PERCENTAGE OF COMMUNITY MIX  
2000 THROUGH 2013, FOR 2014 LZ 150

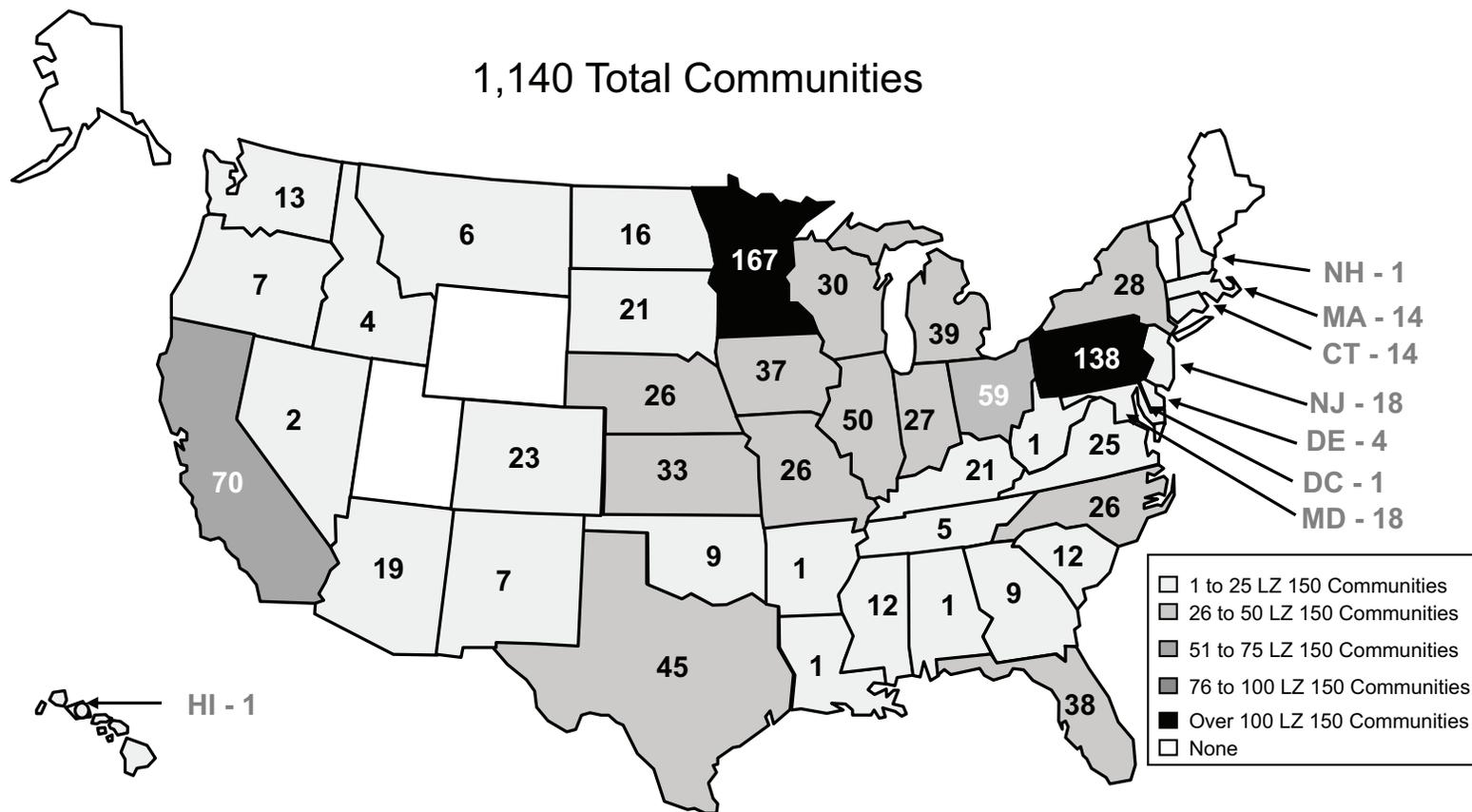


\*Reflects change from 100 to 150 with the 2014 publication

## 4-3 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Locations

#### 4-3a COMMUNITY LOCATIONS



## 4-3 2014 LeadingAge Ziegler 150

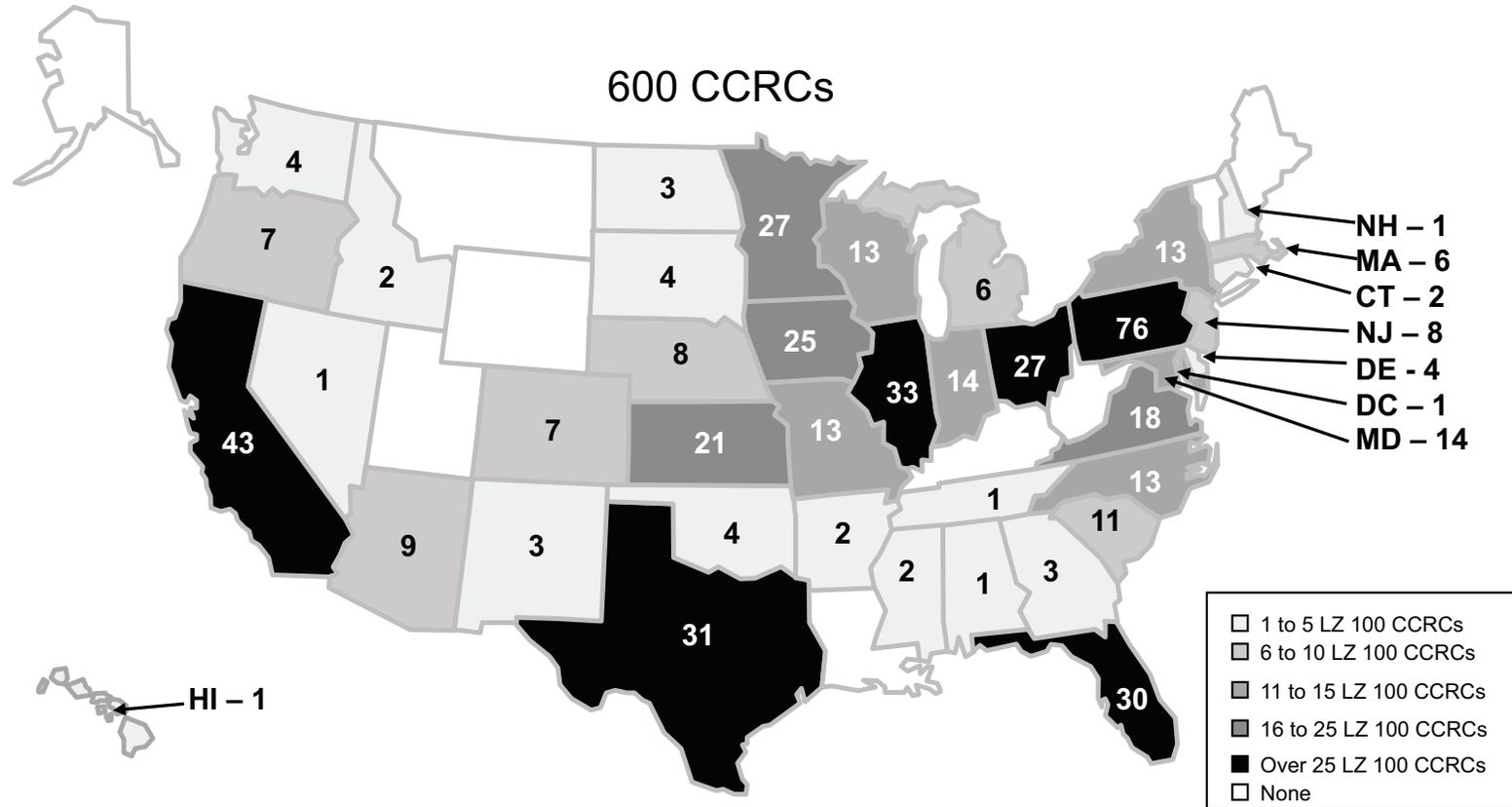
### Organizational Characteristics: Locations 4-3b TOP FIVE STATES BY COMMUNITY TYPE

CCRC			IL		AL		NH	
1	PA	76	1	MN 40	1	MN 56	1	MN 42
2	CA	43	2	PA 19	2	PA 17	2	OH 12
3	IL	33	3	MI 16	3	NE 10	3	PA 11
4	TX	31	4	CA 12	4	CA, ND, SD 8	4	NY 10
5	FL	30	5	KY 9	5	WI 7	5	IA 9

## 4-3 2014 LeadingAge Ziegler 150

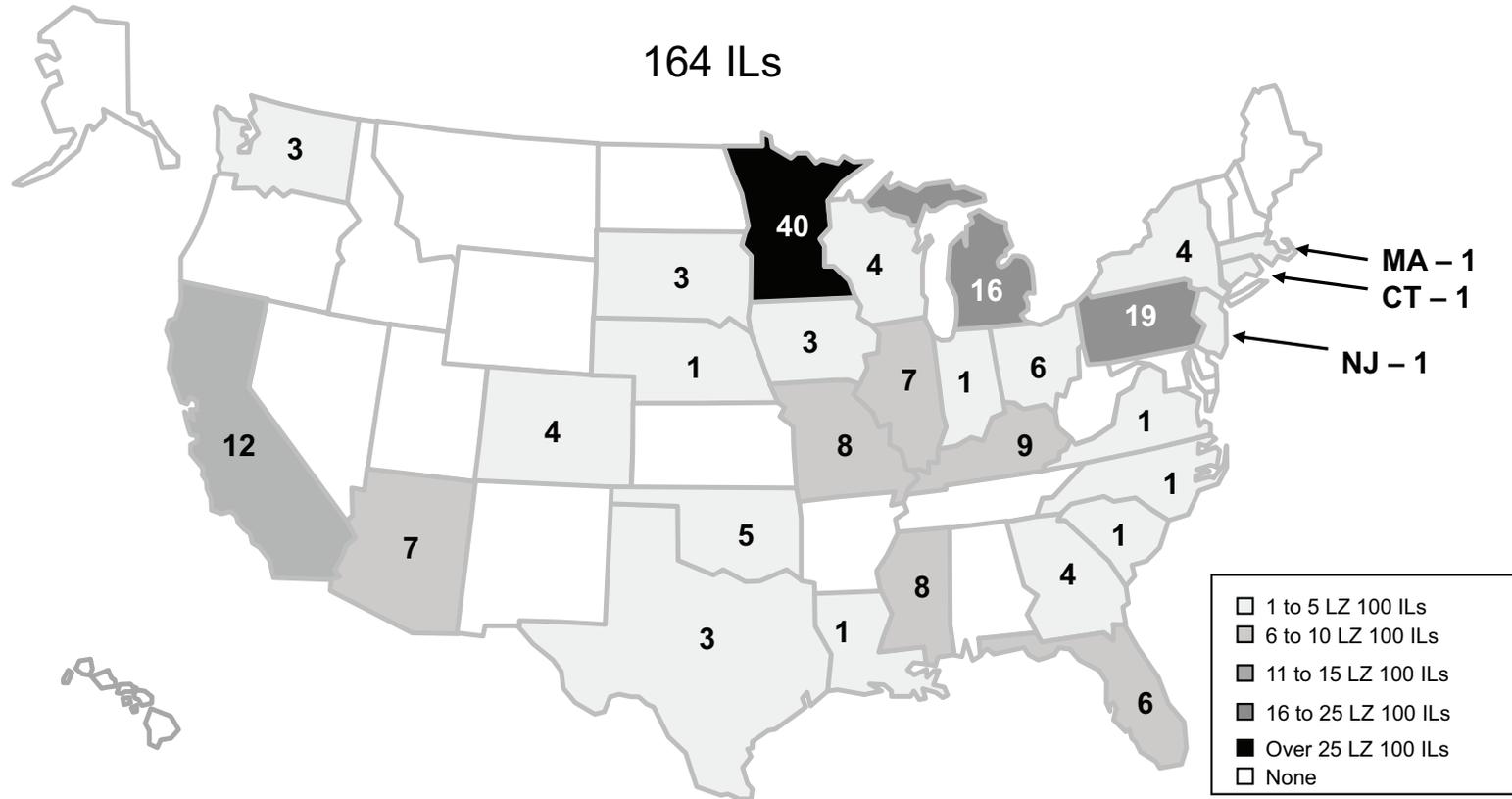
### Organizational Characteristics: Locations

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



## 4-3 2014 LeadingAge Ziegler 150

Organizational Characteristics: Locations  
4-3d INDEPENDENT LIVING (IL) LOCATIONS

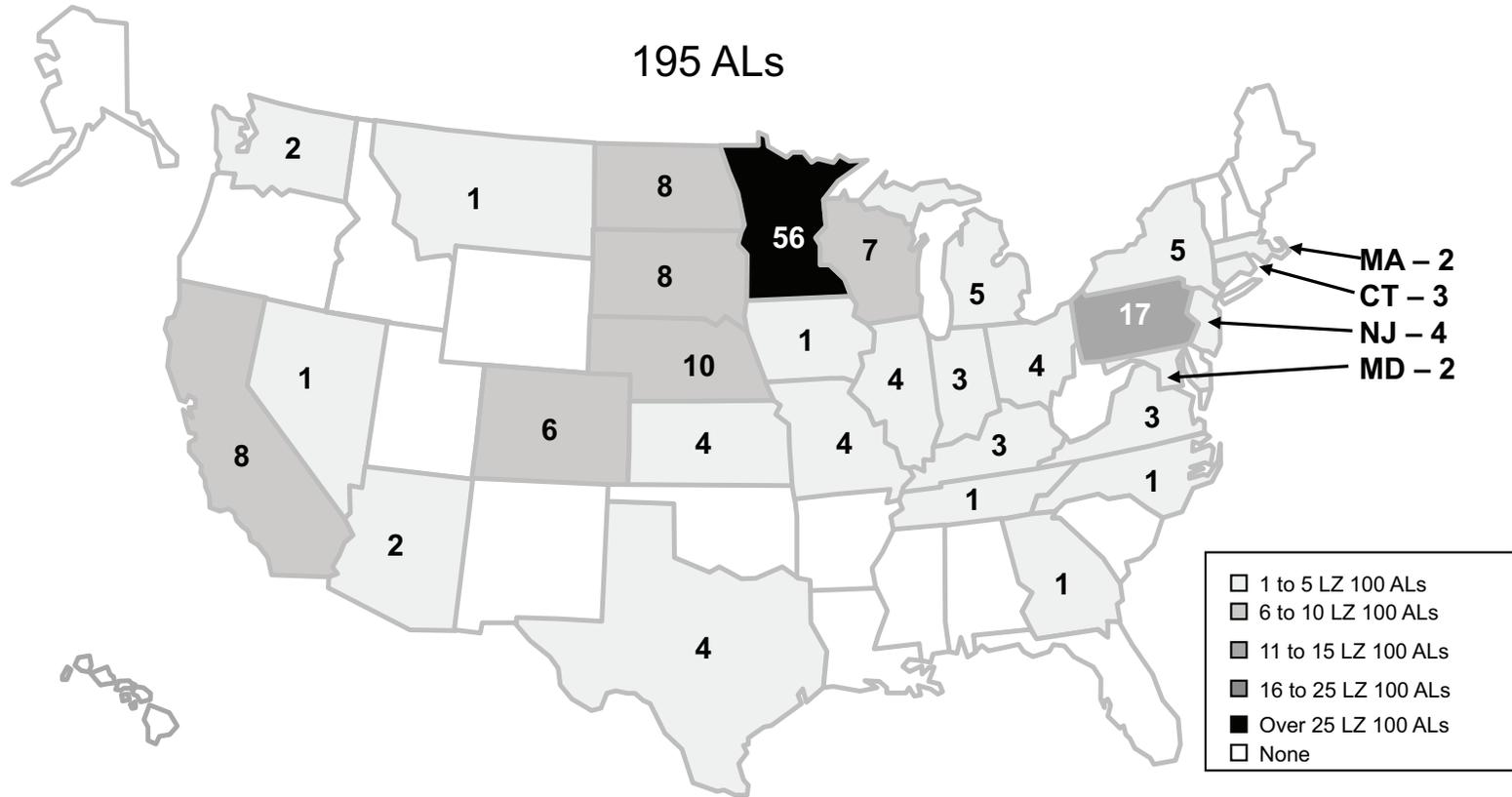


LeadingAge 150 Ziegler

## 4-3 2014 LeadingAge Ziegler 150

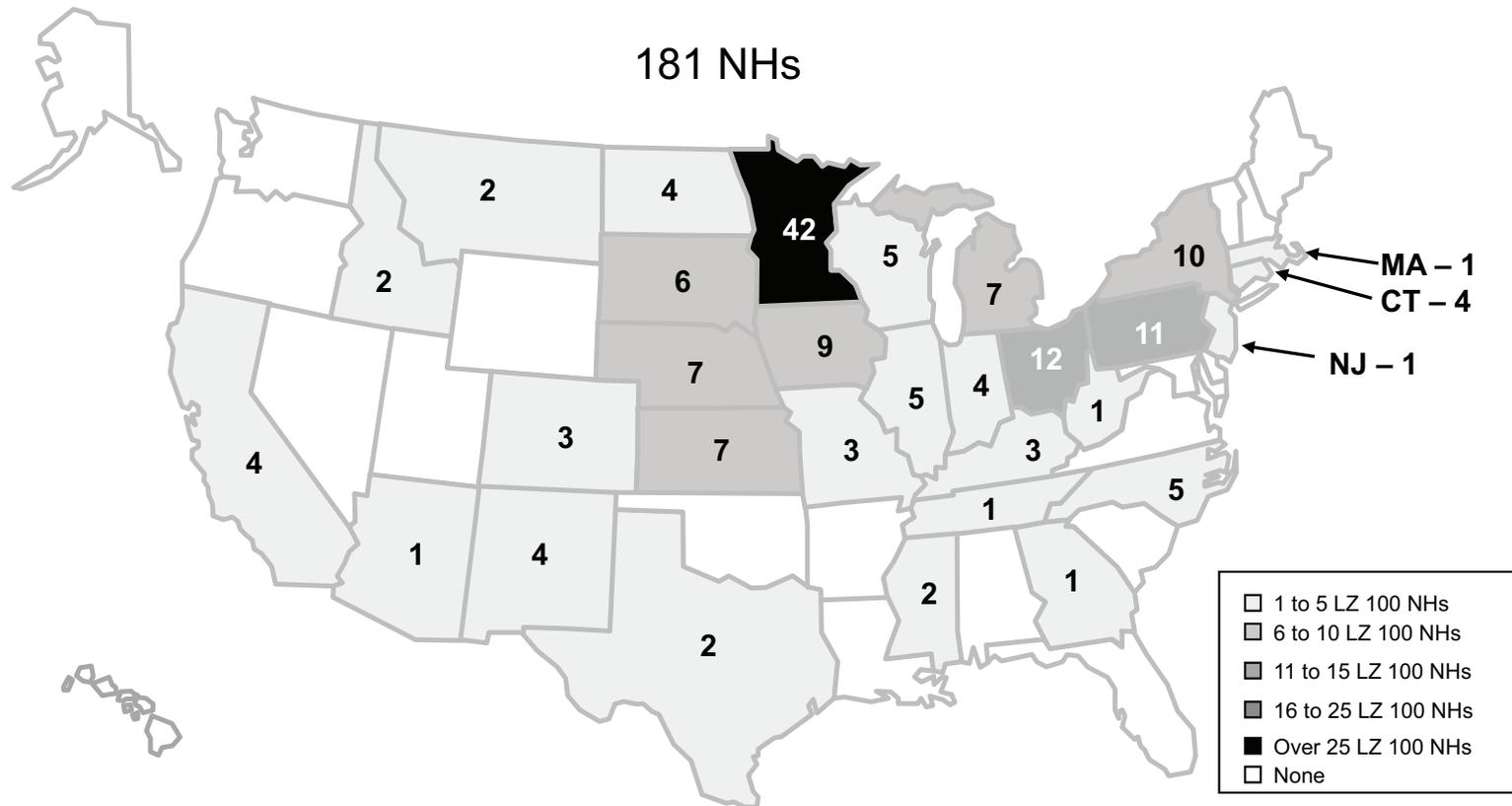
### Organizational Characteristics: Locations

#### 4-3e ASSISTED LIVING (AL) COMMUNITY LOCATIONS



## 4-3 2014 LeadingAge Ziegler 150

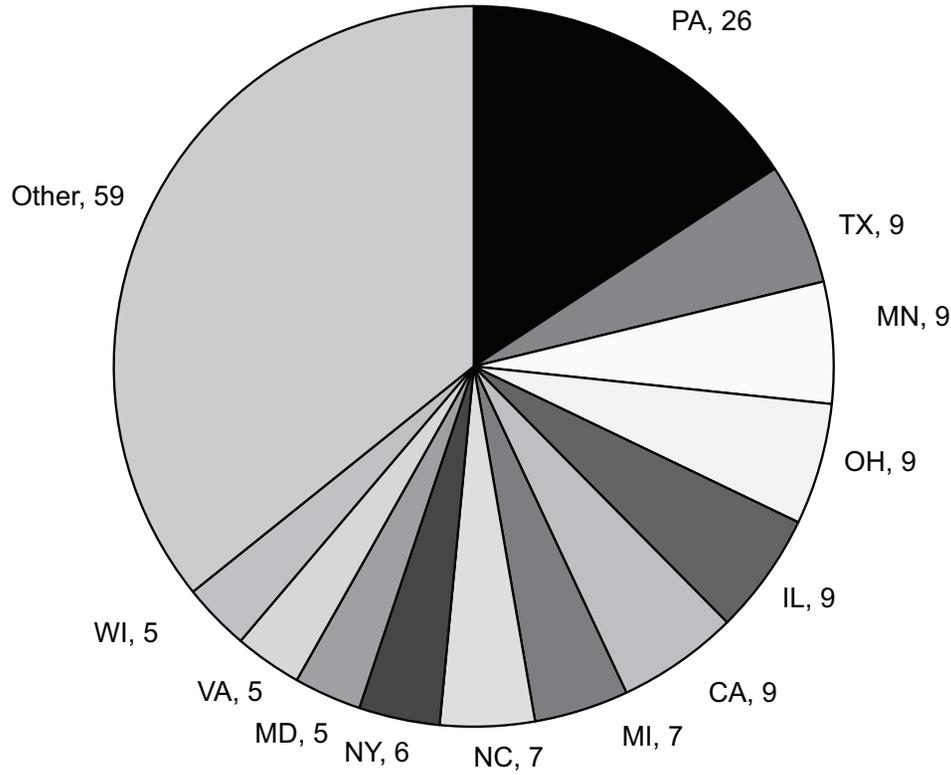
Organizational Characteristics: Locations  
4-3f NURSING HOME (NH) LOCATIONS



### 4-4 2014 LeadingAge Ziegler 150

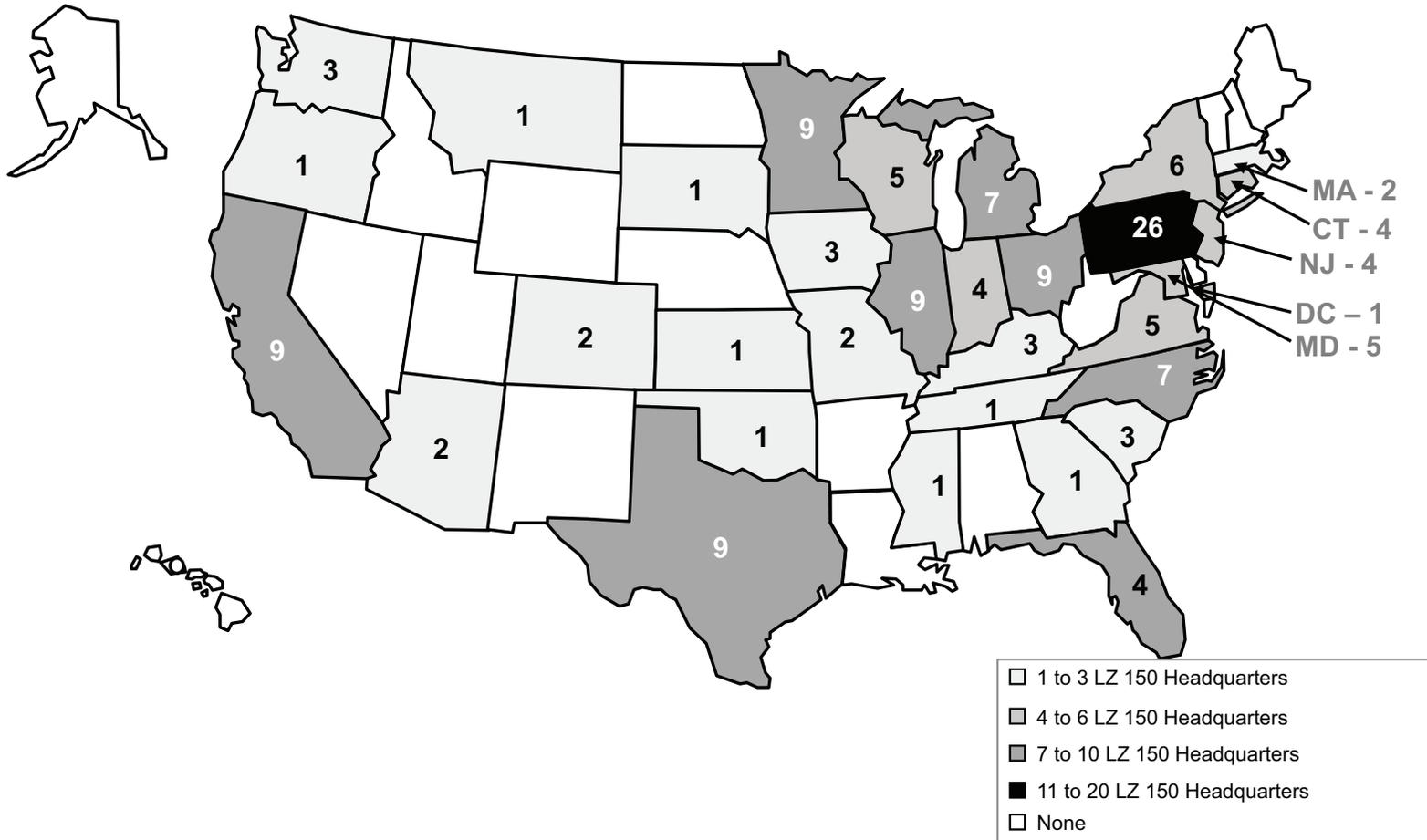
#### Organizational Characteristics: System Headquarters

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



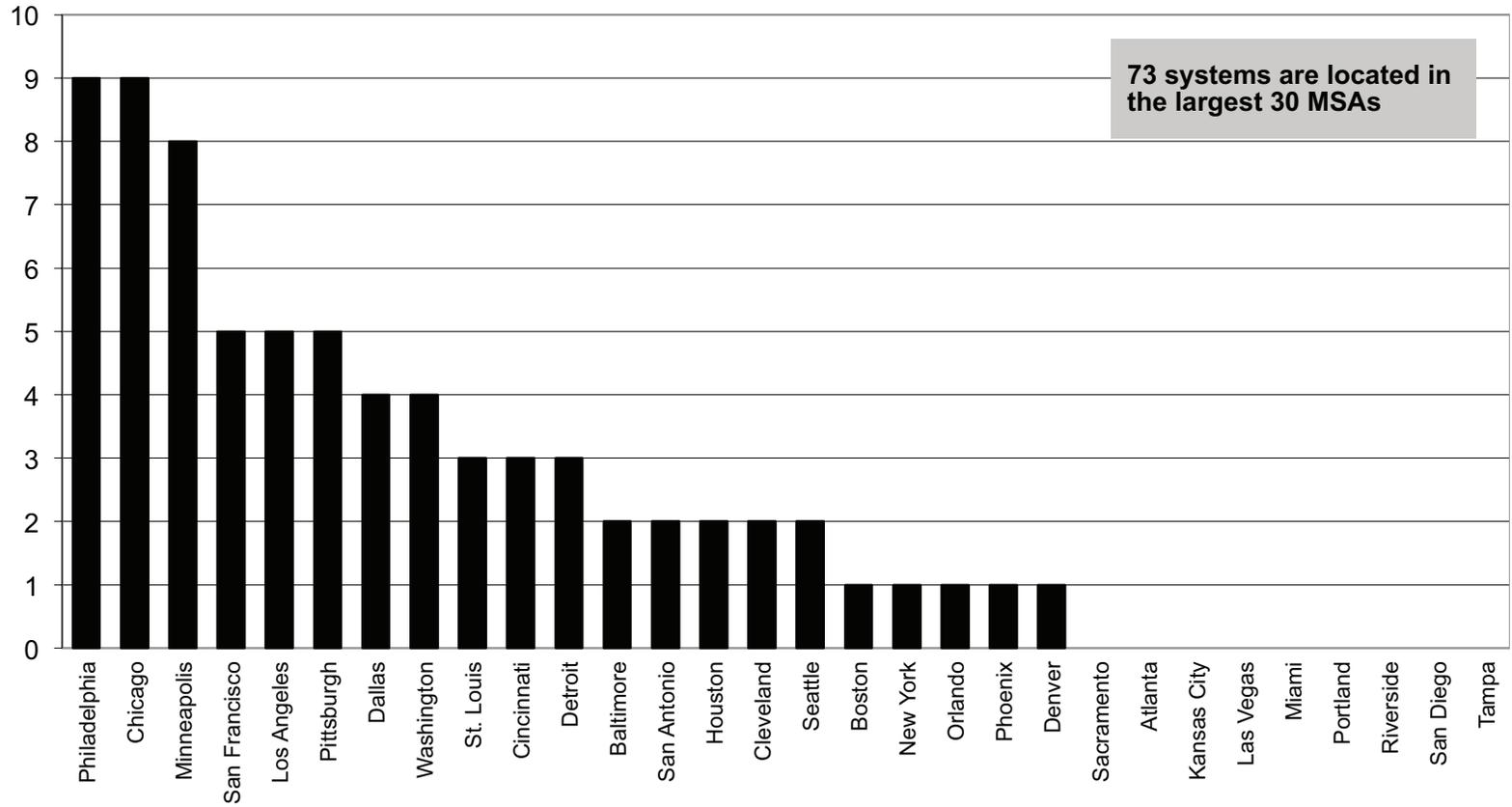
# 4-4 2014 LeadingAge Ziegler 150

## Organizational Characteristics: System Headquarters 4-4b HEADQUARTERS' LOCATIONS



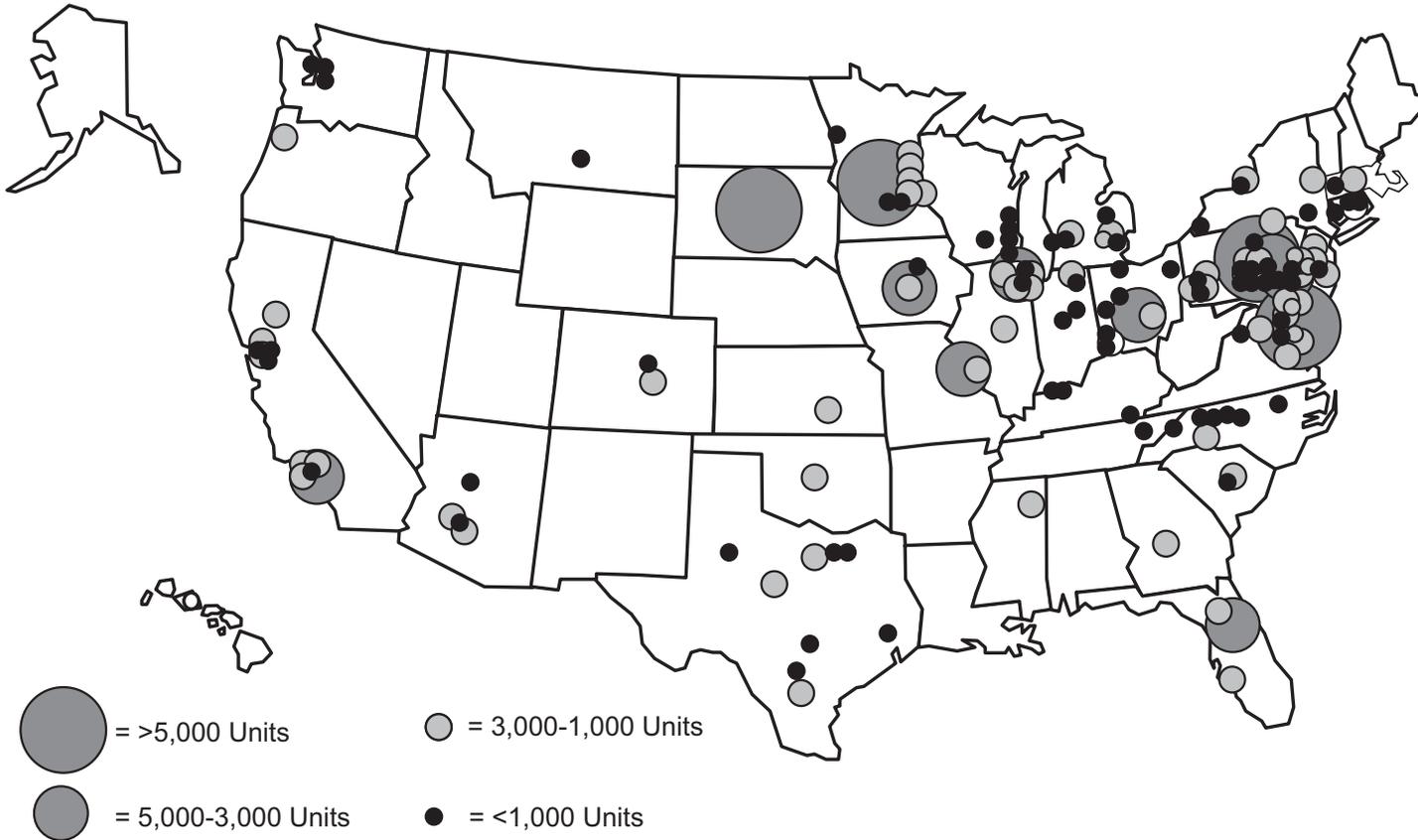
## 4-5 2014 LeadingAge Ziegler 150

Organizational Characteristics: Metropolitan Statistical Areas (MSAs)  
 4-5a NUMBER OF HEADQUARTERS LOCATED IN THE LARGEST 30 MSAs



## 4-5 2014 LeadingAge Ziegler 150

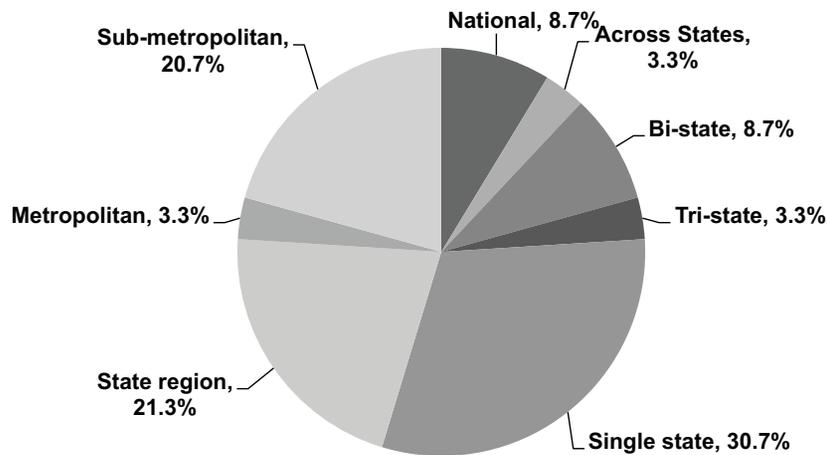
Organizational Characteristics: Metropolitan Statistical Areas (MSAs)  
4-5b HEADQUARTERS' LOCATIONS BY SIZE



2

## 4-6 2014 LeadingAge Ziegler 150

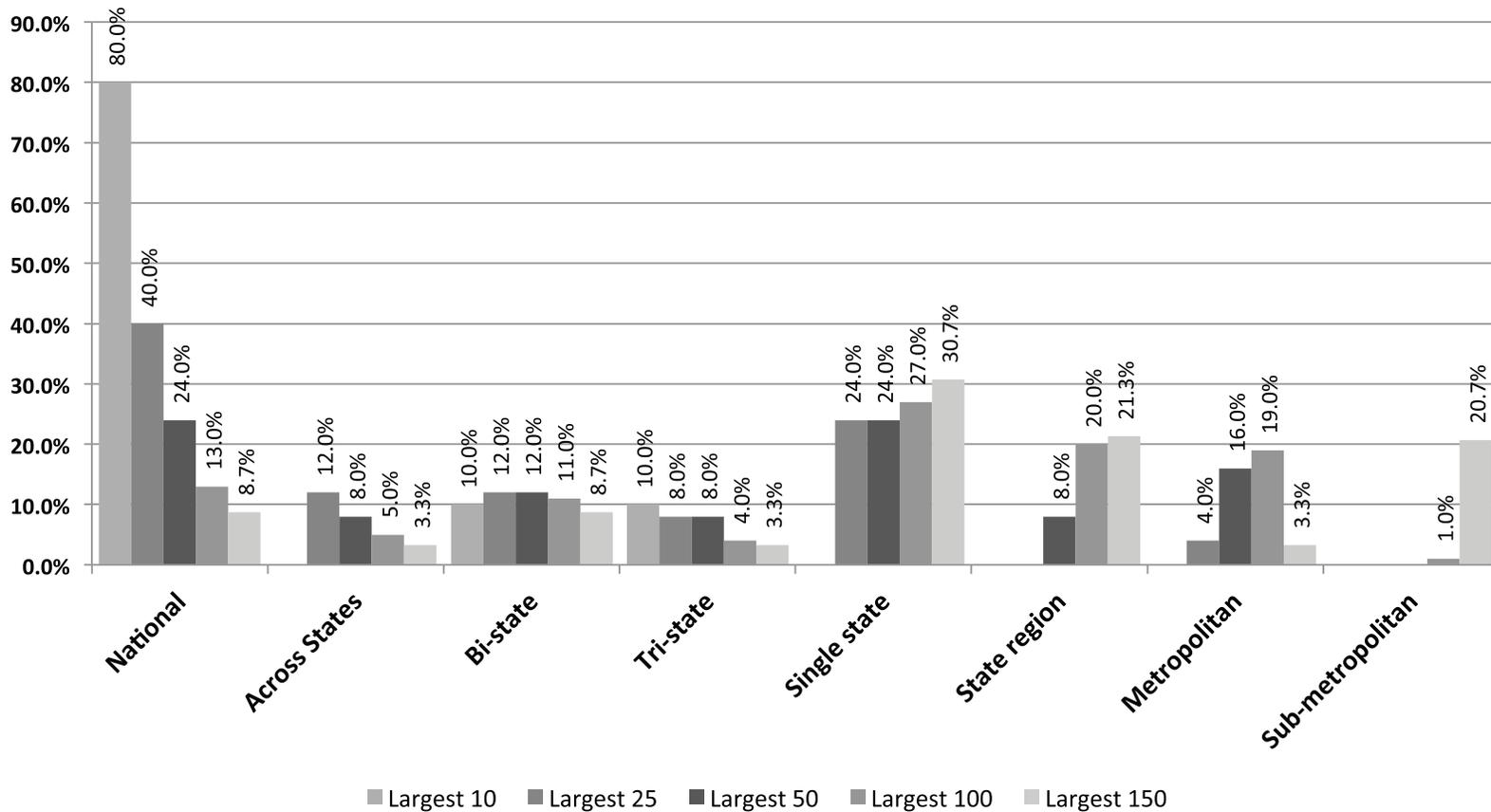
### Organizational Characteristics: Geographic Classifications 4-6a PRIMARY CLASSIFICATIONS



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	3
	Metropolitan	2
Bi-state	Single-state	3
	State region	4
	Metropolitan	6
Single-state	Sub-metropolitan	0
	State region	7
	Metropolitan	4
State region	Metropolitan	5
	Sub-metropolitan	1
Metropolitan	Sub-metropolitan	2
Total Organizations with Secondary Classifications		48

## 4-6 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Geographic Classifications 4-6b PRIMARY CLASSIFICATIONS BY LARGEST, 10, 25, 50, 100 & TOTAL



## 4-7 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Corporate Name Changes

2014 Rank	Current System Name	Logo	Previous System Name
56	Lutheran Services Carolinas		Lutheran Services for the Aging
112	Wellspring Lutheran Services		Lutheran Homes of Michigan
Next 50	Redstone Highlands Senior Living Communities		Redstone Presbyterian SeniorCare

## 4-8 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Debt Ratings

#### 4-8a LZ 150 WITH RATED DEBT AS OF 12/31/2013

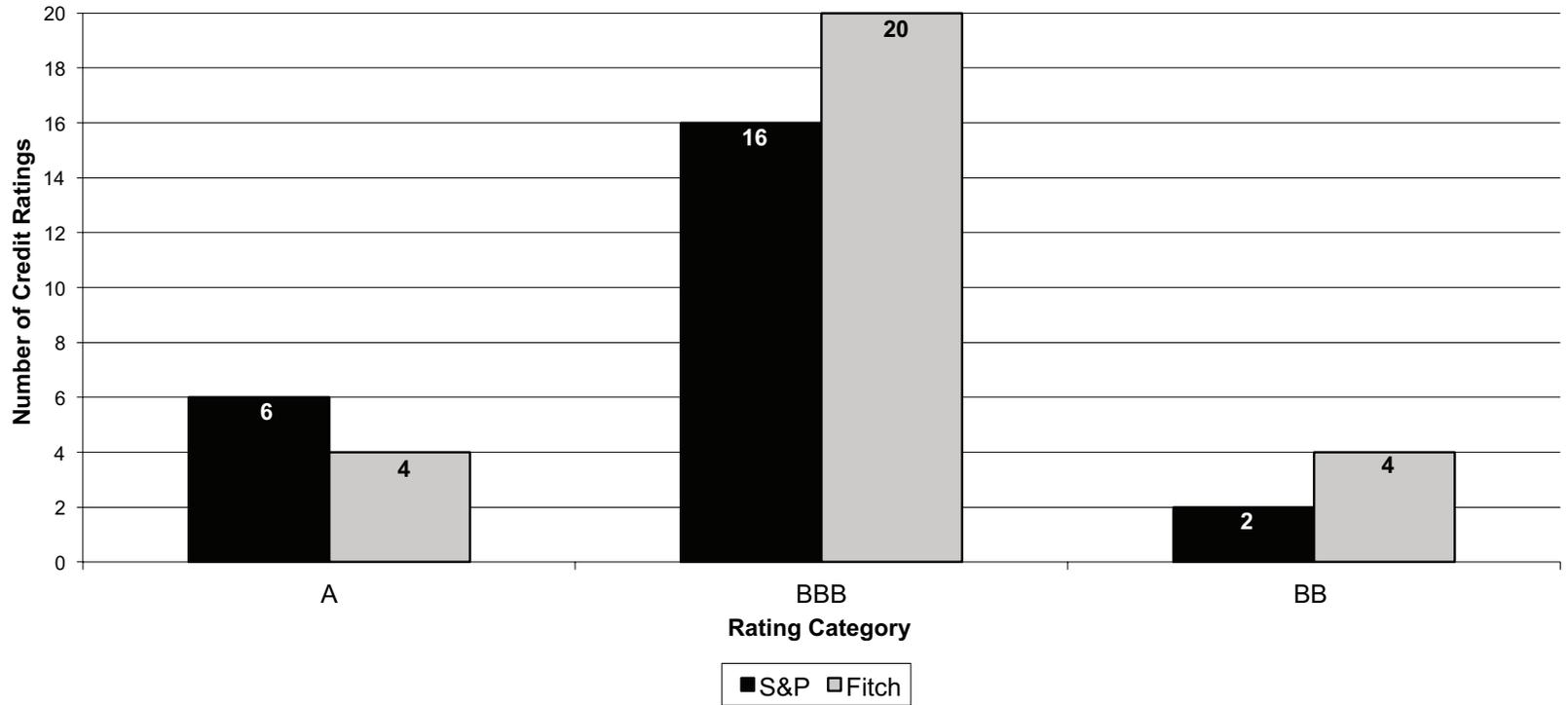
2014 Rank	System Name	State	Rated	
			Fitch	S&P
3	ACTS Retirement Services, Inc.	PA	BBB+	A-
75	Air Force Villages, Inc.	TX	NR	BBB-
16	Asbury Communities	MD	NR	BBB
51	be.group	CA	BBB-	NR
102	BHI Senior Living, Inc.	IN	NR	BBB+
42	Buckner Retirement Services, Inc.	TX	A-	A
106	Christian Care Centers	TX	BBB-	BBB-
130	Christian Care Communities, Inc.	KY	BBB-	NR
17	Christian Homes, Inc.	IL	NR	BBB-
31	Concordia Lutheran Ministries	PA	A+	NR
14	Cornerstone Affiliates	CA	BBB	BBB+
5	Covenant Retirement Communities, Inc.	IL	BBB-	BBB+
22	Diakon Lutheran Social Ministries	PA	NR	BBB+
39	Episcopal Senior Communities	CA	NR	BBB+
37	Eskaton	CA	BBB	NR
1	Evangelical Lutheran Good Samaritan Society	SD	A-	NR
26	Franciscan Communities, Inc.	IL	NR	BBB-
57	Friendship Senior Options	IL	NR	BB-
15	Front Porch Communities and Services	CA	BBB+	NR
108	Garden Spot Village	PA	BBB	NR
98	Givens Estates	NC	NR	BBB
94	Goodwin House Incorporated	VA	NR	BBB
48	Greencroft Communities	IN	NR	BB+
46	Holland Home	MI	NR	BB+

2014 Rank	System Name	State	Rated	
			Fitch	S&P
107	Life Enriching Communities	OH	BBB	NR
7	Lifespace Communities, Inc.	IA	NR	A
116	Lutheran Homes Society	OH	BB+	NR
10	Lutheran Senior Services	MO	NR	BBB+
20	Masonic Villages	PA	A	NR
55	Masonicare, Inc.	CT	BBB	NR
120	Messiah Lifeways	PA	BBB	NR
99	Morningside Ministries	TX	NR	BBB-
68	Northern California Presbyterian Homes and Services, Inc.	CA	BBB	NR
13	Ohio Presbyterian Retirement Services	OH	BBB-	NR
28	Otterbein Senior Lifestyle Choices	OH	A-	NR
77	Presby's Inspired Life	PA	NR	BBB
4	Presbyterian Homes and Services	MN	NR	NR
12	Presbyterian Senior Living	PA	NR	BBB+
52	Presbyterian Villages of Michigan	MI	NR	BB+
23	Shell Point	FL	BB+	NR
25	Springpoint Senior Living, Inc.	NJ	NR	BBB+
132	The Loomis Communities	MA	BBB-	NR
72	United Methodist Homes of New Jersey	NJ	NR	BBB-
146	United Methodist Retirement Communities, Inc.	MI	NR	BBB+
118	Wesley Homes	WA	BBB-	BBB-
11	Westminster Communities of Florida	FL	NR	A-
24	Willow Valley Communities	PA	A-	NR

NR indicates that organization was not among largest 100 in the 2013 report

# 4-8 2014 LeadingAge Ziegler 150

## Organizational Characteristics: Debt Ratings 4-8b RATINGS BY CATEGORY



46 ratings in "A" & "BBB" Category  
6 in "BB" Category  
52 total ratings of debt for 47 organizations

## 4-9 2014 LeadingAge Ziegler 150

### Analysis of the Data: Revenues

#### 4-9a ANNUAL REVENUE BY ORGANIZATION

2014 Rank	System Name	State	Annual Revenue Tier
1	Evangelical Lutheran Good Samaritan Society	SD	Tier I
2	National Senior Campuses	MD	Tier I
3	ACTS Retirement Services, Inc.	PA	Tier I
32	Jewish Home Lifecare	NY	Tier I
4	Presbyterian Homes and Services	MN	Tier I
34	National Church Residences	OH	Tier I
5	Covenant Retirement Communities, Inc.	IL	Tier I
22	Diakon Lutheran Social Ministries	PA	Tier I
8	The Kendal Corporation	PA	Tier I
14	Cornerstone Affiliates	CA	Tier I
35	Hebrew SeniorLife	MA	Tier I
7	Lifespace Communities, Inc.	IA	Tier I
12	Presbyterian Senior Living	PA	Tier I
9	Pacific Retirement Services	OR	Tier II
20	Masonic Villages	PA	Tier II
13	Ohio Presbyterian Retirement Services	OH	Tier II
55	Masonicare, Inc.	CT	Tier II
16	Asbury Communities	MD	Tier II
15	Front Porch Communities and Services	CA	Tier II
11	Westminster Communities of Florida	FL	Tier II
21	Volunteers of America	VA	Tier II
17	Christian Homes, Inc.	IL	Tier II
41	Loretto	NY	Tier II
25	Springpoint Senior Living, Inc.	NJ	Tier II
19	Ecumen	MN	Tier II

2014 Rank	System Name	State	Annual Revenue Tier
10	Lutheran Senior Services	MO	Tier II
31	Concordia Lutheran Ministries	PA	Tier II
66	Presbyterian SeniorCare	PA	Tier II
39	Episcopal Senior Communities	CA	Tier II
26	Franciscan Communities, Inc.	IL	Tier II
18	Presbyterian Manors of Mid-America, Inc.	KS	Tier II
46	Holland Home	MI	Tier II
36	Elim Care, Inc.	MN	Tier II
37	Eskaton	CA	Tier II
59	Phoebe Ministries	PA	Tier II
27	Augustana Care	MN	Tier II
23	Shell Point	FL	Tier II
54	Lutheran Life Communities	IL	Tier II
43	Presbyterian Homes	IL	Tier II
38	Providence Life Services	IL	Tier III
122	Crista Senior Living	WA	Tier III
105	Lutheran Social Services of Michigan	MI	Tier III
28	Otterbein Senior Lifestyle Choices	OH	Tier III
63	Lutheran SeniorLife	PA	Tier III
30	Senior Quality Lifestyles Corporation	TX	Tier III
51	be.group	CA	Tier III
72	United Methodist Homes of New Jersey	NJ	Tier III
65	Lutheran Social Services of South Central Pennsylvania	PA	Tier III
33	Homewood Retirement Centers	MD	Tier III
45	WesleyLife	IA	Tier III

N/A: Revenue data unavailable

Tier I: > \$200 million
Tier II: \$100-\$199 million
Tier III: \$50-\$99 million
Tier IV: \$25-\$49 million
Tier V: < \$25 million

## 4-9 2014 LeadingAge Ziegler 150

### Analysis of the Data: Revenues

#### 4-9a ANNUAL REVENUE BY ORGANIZATION

2014 Rank	System Name	State	Annual Revenue Tier
24	Willow Valley Communities	PA	Tier III
123	Lutheran Social Ministries of New Jersey	NJ	Tier III
85	Liberty Lutheran Services	PA	Tier III
56	Lutheran Services Carolinas (fka Lutheran Services for the Aging)	NC	Tier III
77	Presby's Inspired Life	PA	Tier III
76	United Church Homes, Inc.	OH	Tier III
89	St. Ann's Community	NY	Tier III
64	EMA	MD	Tier III
71	Lutheran Homes of South Carolina	SC	Tier III
49	Bethesda Health Group, Inc.	MO	Tier III
90	Presbyterian Communities and Services	TX	Tier III
94	Goodwin House Incorporated	VA	Tier III
95	Los Angeles Jewish Home	CA	Tier III
60	Virginia United Methodist Homes, Inc.	VA	Tier III
69	United Methodist Homes	NY	Tier III
48	Greencroft Communities	IN	Tier III
61	Virginia Baptist Homes	VA	Tier III
130	Christian Care Communities, Inc.	KY	Tier III
68	Northern California Presbyterian Homes and Services, Inc.	CA	Tier III
81	The United Methodist Retirement Homes, Inc.	NC	Tier III
88	Westminster Ingleside Retirement Communities	DC	Tier III
116	Lutheran Homes Society	OH	Tier III
52	Presbyterian Villages of Michigan	MI	Tier III
139	Lutheran Social Services of the South, Inc.	TX	Tier III
140	Sholom Community Alliance	MN	Tier III

2014 Rank	System Name	State	Annual Revenue Tier
103	United Church of Christ Homes	PA	Tier III
145	Porter Hills Retirement Communities and Services	MI	Tier III
44	Mississippi Methodist Senior Services, Inc.	MS	Tier III
78	The Presbyterian Homes, Inc.	NC	Tier III
112	Wellspring Lutheran Services	MI	Tier III
114	Albright Care Services	PA	Tier III
79	United Church Homes and Services	NC	Tier III
73	Wesley Enhanced Living	PA	Tier III
62	American Baptist Homes of the Midwest	MN	Tier III
58	SantaFe Senior Living	FL	Tier III
131	LindenGrove, Inc.	WI	Tier IV
107	Life Enriching Communities	OH	Tier IV
99	Morningside Ministries	TX	Tier IV
42	Buckner Retirement Services, Inc.	TX	Tier IV
97	LutherCare	PA	Tier IV
84	Cedar Community	WI	Tier IV
117	Saint Therese	MN	Tier IV
50	Bethesda Senior Living Communities	CO	Tier IV
75	Air Force Villages, Inc.	TX	Tier IV
29	Christian Care Companies	AZ	Tier IV
83	Mather LifeWays	IL	Tier IV
109	Christian Living Communities	CO	Tier IV
124	Maple Knoll Communities, Inc.	OH	Tier IV
93	Simpson Senior Services	PA	Tier IV
98	Givens Estates	NC	Tier IV

N/A: Revenue data unavailable

Tier I: > \$200 million
Tier II: \$100-\$199 million
Tier III: \$50-\$99 million
Tier IV: \$25-\$49 million
Tier V: < \$25 million

## 4-9 2014 LeadingAge Ziegler 150

### Analysis of the Data: Revenues

#### 4-9a ANNUAL REVENUE BY ORGANIZATION

2014 Rank	System Name	State	Annual Revenue Tier
111	The Ohio Masonic Home	OH	Tier IV
110	Eventide	MN	Tier IV
142	Baptist Homes Society	PA	Tier IV
137	Presbyterian Retirement Communities Northwest	WA	Tier IV
146	United Methodist Retirement Communities, Inc.	MI	Tier IV
128	Church Homes inc.	CT	Tier IV
82	Menno Haven	PA	Tier IV
87	Oakwood Lutheran Senior Ministries	WI	Tier IV
91	Living Branches	PA	Tier IV
92	Presbyterian Communities of South Carolina	SC	Tier IV
53	Baptist Village Communities	OK	Tier IV
129	National Lutheran Communities & Services	MD	Tier IV
121	Messiah Lifeways	PA	Tier IV
134	Heritage Ministries	NY	Tier IV
102	BHI Senior Living, Inc.	IN	Tier IV
113	Luther Manor	WI	Tier IV
136	Smith Senior Living	IL	Tier IV
106	Christian Care Centers	TX	Tier IV
100	Sunnyside Presbyterian Home, Inc.	VA	Tier IV
120	Masonic Homes of Kentucky	KY	Tier IV
115	Landis Communities	PA	Tier IV
147	Masonic Homes of California	CA	Tier IV
132	Asbury Inc.	TN	Tier IV
108	Garden Spot Village	PA	Tier IV
118	Wesley Homes	WA	Tier IV

2014 Rank	System Name	State	Annual Revenue Tier
144	St. John's Lutheran Ministries	MT	Tier IV
138	Shepherd of the Valley Lutheran Retirement Services	OH	Tier IV
149	Medford Leas	NJ	Tier IV
96	Sunset Retirement Communities and Services	MI	Tier IV
135	Baptist Retirement Homes of North Carolina, Inc.	NC	Tier IV
40	Magnolia Manor	GA	Tier IV
150	Life Care Pastoral Services	FL	Tier IV
6	Retirement Housing Foundation	CA	Tier IV
148	Baptist Life Communities	KY	Tier IV
74	Elant	NY	Tier IV
119	Lutheran Life Villages	IN	Tier IV
80	United Methodist Memorial Home	IN	Tier IV
143	Friends Homes, Inc.	NC	Tier V
101	Western Home Communities	IA	Tier V
133	The Loomis Communities	MA	Tier V
47	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	Tier V
126	LifeStream Complete Senior Living, Inc.	AZ	Tier V
70	Walker Methodist	MN	Tier V
67	Sears Methodist Retirement System, Inc.	TX	Tier V
57	Friendship Senior Options	IL	Tier V
125	Vincentian Collaborative System	PA	Tier V
141	Mercy Community Health	CT	Tier V
104	Methodist Retirement Communities	TX	Tier V
127	United Methodist Homes	CT	Tier V
86	VMP	WI	N/A

N/A: Revenue data unavailable

Tier I: > \$200 million
Tier II: \$100-\$199 million
Tier III: \$50-\$99 million
Tier IV: \$25-\$49 million
Tier V: < \$25 million

## 4-9 2014 LeadingAge Ziegler 150

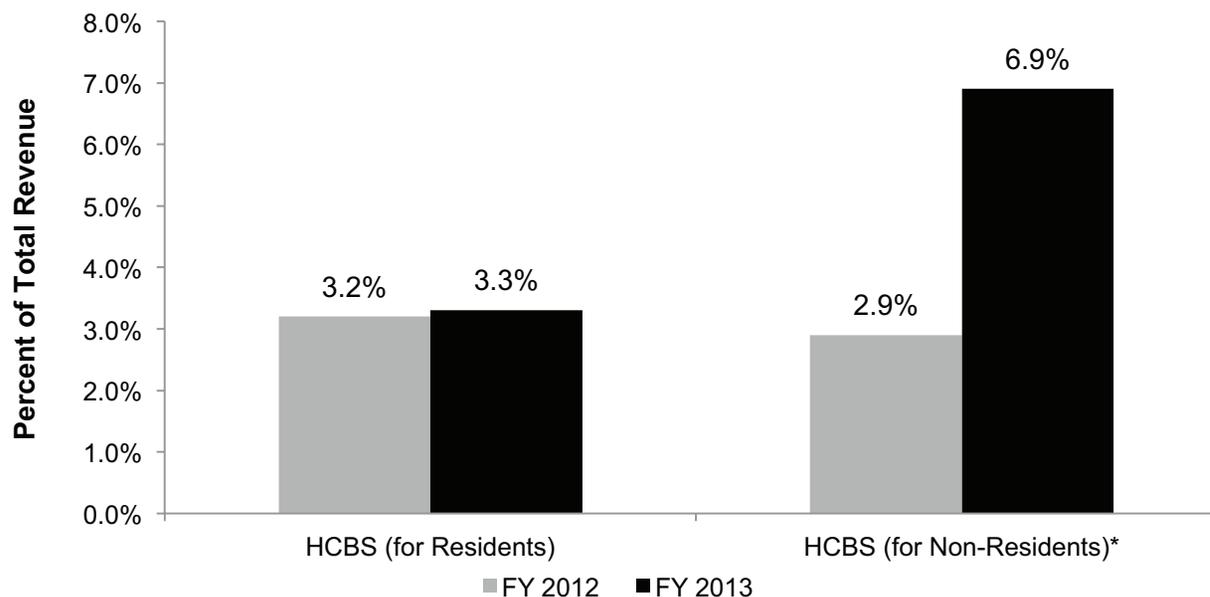
### Analysis of the Data: Revenues

#### 4-9b ANNUAL REVENUE BY ORGANIZATION

	Number of LZ 150 Organizations	% of total LZ 150
Tier I: > \$200 million	13	8.7%
Tier II: \$100-\$199 million	26	17.4%
Tier III: \$50-\$99 million	46	30.9%
Tier IV: \$25-\$49 million	52	34.9%
Tier V: < \$25 million	12	8.1%

### Analysis of the Data: Revenues

#### 4-9c AVERAGE REVENUE FOR HCBS



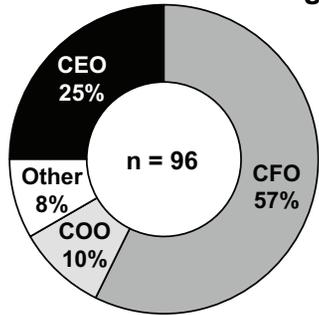
\*Note that several providers with significant revenue from off-campus HCBS are inflating the average.

# 4-10 2014 LeadingAge Ziegler 150

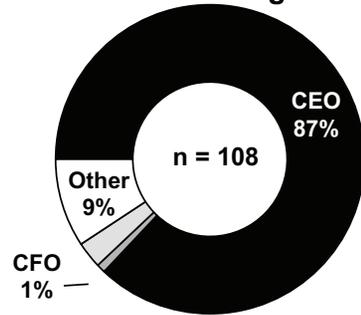
## Analysis of the Data: Corporate Structure

### 4-10a 2014 LZ 150 CORPORATE LEVEL POSITIONS, BY AREA AND REPORTING EXECUTIVE

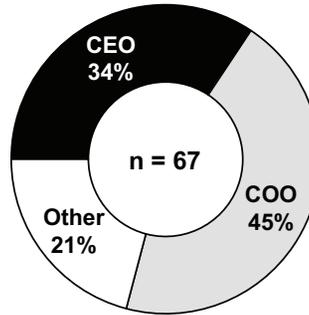
Information Technology



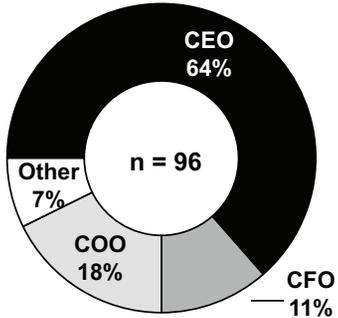
Fundraising



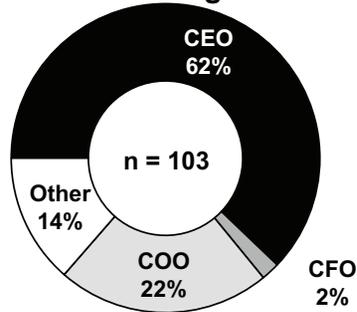
HCBS



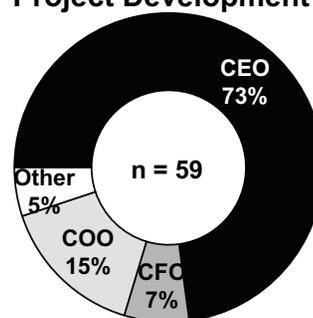
Human Resources



Marketing



Project Development

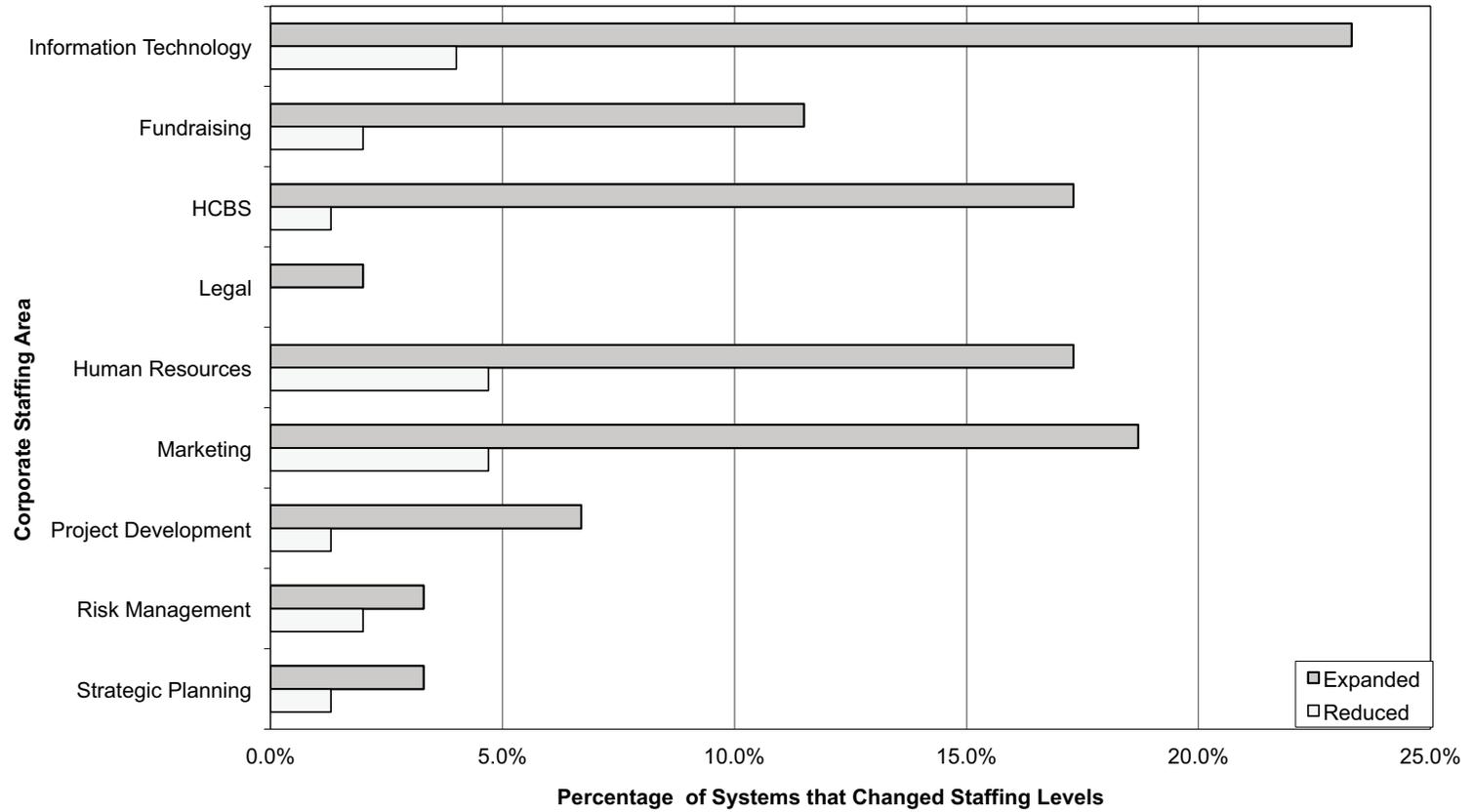


Individual n's represent the number of systems that have a position for each area.

## 4-10 2014 LeadingAge Ziegler 150

### Analysis of the Data: Corporate Structure

#### 4-10b 2014 LZ 150 CHANGE IN CORPORATE STAFFING, BY AREA



## 4-10 2014 LeadingAge Ziegler 150

### Analysis of the Data: Corporate Structure

#### 4-10c 2014 LZ 150 CORPORATE STAFFING CHANGES

2014 Rank	System Name	State	Current (2013)	Previous
<b>CEO</b>				
35	Hebrew SeniorLife	MA	Lou Woolf	Len Fishman
121	Messiah Lifeways	PA	Curtis Stutzman	Emerson Leshner
<b>CFO</b>				
34	National Church Residences	OH	Steven Van Camp	Joseph Kasberg
64	EMA	MD	Jayson Luckenbaugh	William Fisher
97	LutherCare	PA	Elizabeth Brennan	William Kiely
119	Lutheran Life Villages	IN	Donna Scanlon	Alex Kiefer
<b>COO</b>				
9	Lutheran Senior Services	MO	Jake Bell	Linda Detring
19	Ecumen	MN	Shelley Kendrick	Gil Acevedo
79	United Church Homes and Services	NC	Aimee Reimann	Vacant
103	United Church of Christ Homes	PA	Beth McMaster	Christina Ransier

### Analysis of the Data: Corporate Structure

#### 4-10d CORPORATE TENURE

Position	Average Tenure (years)	n*
CEO**	11.92	150
CFO	8.77	147
COO	6.25	83
CIO	6.91	37

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

\*\* 17 systems have CEOs who served on their organization's board prior to becoming the CEO

## 4-11 2014 LeadingAge Ziegler 150

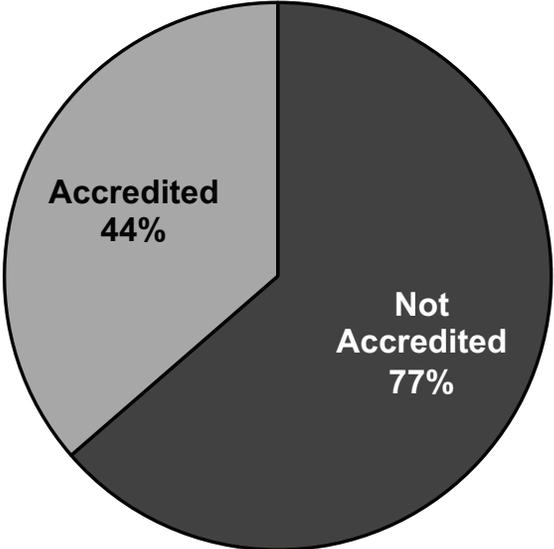
### Organizational Characteristics: Accreditation 4-11a LZ 150 WITH ACCREDITED COMMUNITIES

2014 Rank	System Name	State	Accreditation	
			CARF-CCAC	JCAHO
3	ACTS Retirement Services, Inc.	PA	22	
66	Presbyterian SeniorCare	PA	20	
11	Presbyterian Senior Living	PA	19	
5	Covenant Retirement Communities, Inc.	IL	12	
7	Lifespace Communities, Inc.	IA	12	
14	Cornerstone Affiliates	CA	11	
31	Concordia Lutheran Ministries	PA	10	
8	The Kendal Corporation	PA	9	2
15	Pacific Retirement Services	OR	6	
25	Springpoint Senior Living, Inc.	NJ	6	
16	Asbury Communities	MD	5	
60	Virginia United Methodist Homes, Inc.	VA	5	
39	Episcopal Senior Communities	CA	4	
64	EMA	MD	4	
24	Willow Valley Communities	PA	3	
43	Presbyterian Homes	IL	3	
68	Northern California Presbyterian Homes and Services, Inc.	CA	3	
102	BHI Senior Living, Inc.	IN	3	
133	The Loomis Communities	MA	3	
27	Augustana Care	MN	2	
34	National Church Residences	OH	2	
35	Hebrew SeniorLife	MA	2	

2014 Rank	System Name	State	Accreditation	
			CARF-CCAC	JCAHO
57	Friendship Senior Options	IL	2	
75	Air Force Villages, Inc.	TX	2	
78	The Presbyterian Homes, Inc.	NC	2	
94	Goodwin House Incorporated	VA	2	
124	Maple Knoll Communities, Inc.	OH	2	
37	Eskaton	CA	1	
48	Greencroft Communities	IN	1	
55	Masonicare, Inc.	CT	1	
88	Westminster Ingleside Retirement Communities	DC	1	
98	Givens Estates	NC	1	
115	Landis Communities	PA	1	
136	Smith Senior Living	IL	1	
145	Porter Hills Retirement Communities and Services	MI	1	
149	Medford Leas	NJ	1	
150	Life Care Pastoral Services	FL	1	
2	National Senior Campuses	MD		1
32	Jewish Home Lifecare	NY		3
38	Providence Life Services	IL		4
54	Lutheran Life Communities	IL		2
49	Bethesda Health Group, Inc.	MO		3
	<b>TOTAL</b>		<b>186</b>	<b>15</b>

# 4-11 2014 LeadingAge Ziegler 150

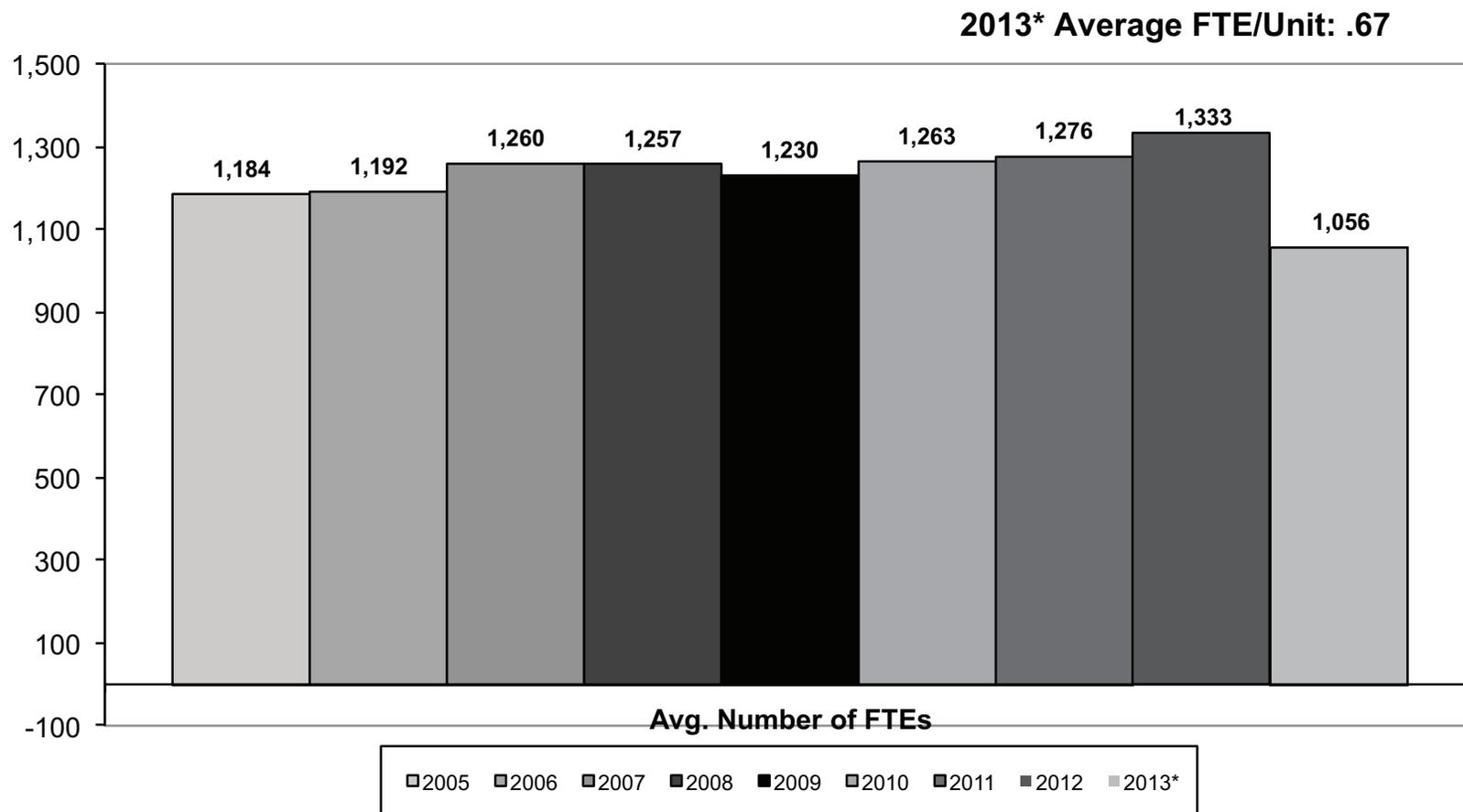
Organizational Characteristics: Accreditation  
4-11b LZ 150 WITH AT LEAST ONE ACCREDITED COMMUNITY



186 Accredited Communities through CARF-CCAC  
15 Accreditations through JCAHO

## 4-12 2014 LeadingAge Ziegler 150

Organizational Characteristics: Staffing  
4-12a AVERAGE OF EMPLOYEES, 2005-2013



\*2013 reflects change to the largest 150 organizations; FTEs for largest 100 is 1,331

## 4-12 2014 LeadingAge Ziegler 150

### Summary of the Data: Staffing

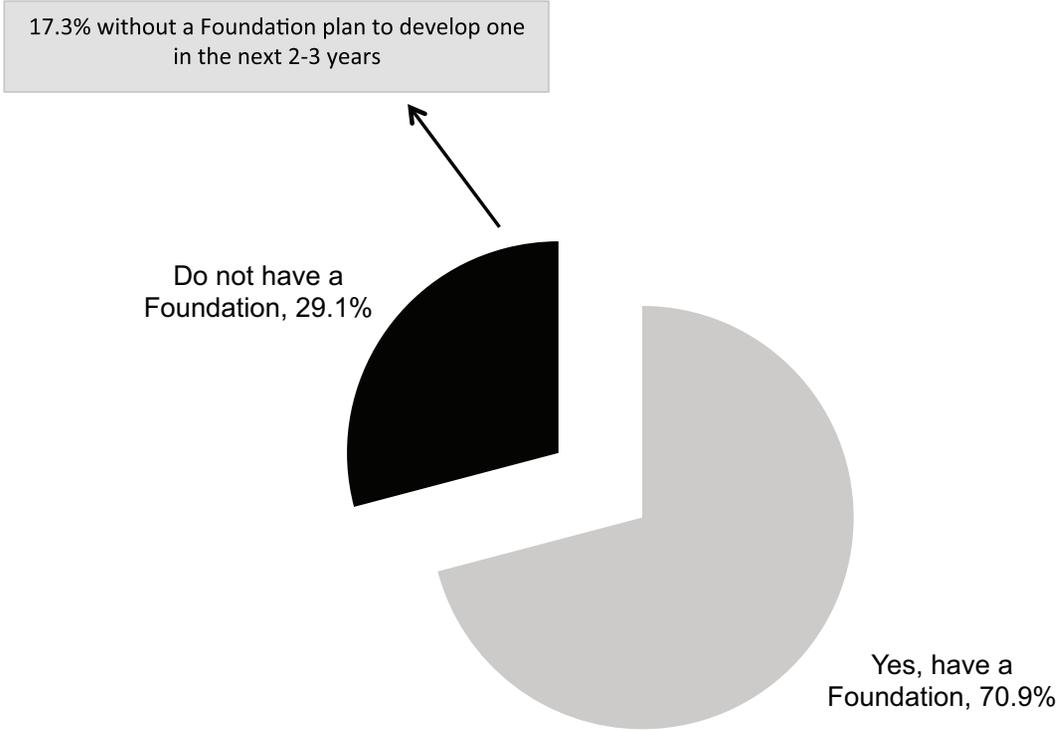
#### 4-12b SUMMARY OF EMPLOYEES, 2010-2013

Analysis for 2014 LZ 150 by Year		
Year	Average Number of FTEs	Average FTE/Resident
2010 avg FTE/resident n=97	1,263	0.66
2011 avg FTE/resident n=96	1,276	0.64
2012 avg FTE/resident n=90	1,333	0.65
2013 avg FTE/resident n=85	1,331	0.67
2013* avg FTE/resident n=121	1,056	0.67

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

# 4-13 2014 LeadingAge Ziegler 150

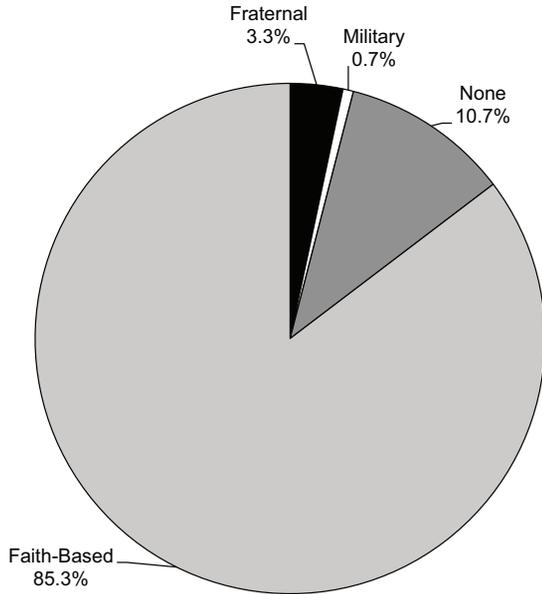
## Organizational Characteristics: Foundations 4-13a LZ 150 ORGANIZATIONS WITH A FOUNDATION



# 4-14 2014 LeadingAge Ziegler 150

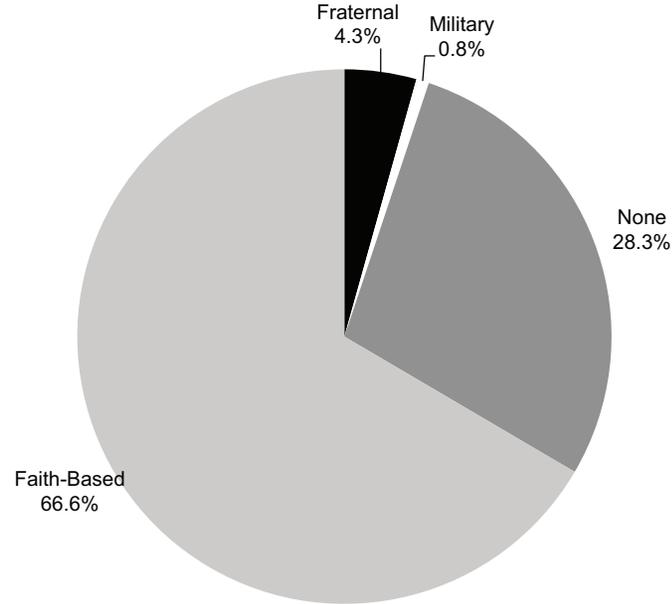
## Analysis of the Data: Affiliations

### 4-14a AFFILIATION BY TOTAL NUMBER OF SYSTEMS



## Analysis of the Data: Affiliations

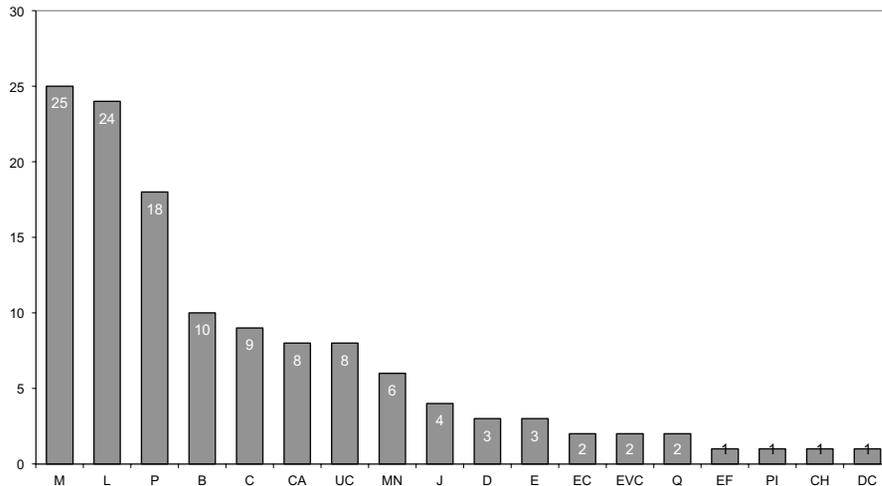
### 4.14b AFFILIATION BY TOTAL NUMBER OF UNITS



## 4-14 2014 LeadingAge Ziegler 150

### Analysis of the Data: Affiliations

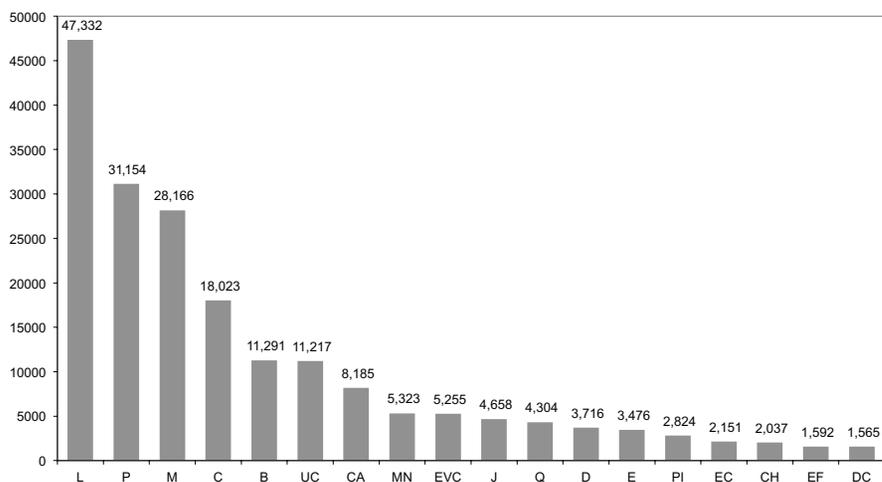
4-14c FAITH-BASED AFFILIATIONS, BY TOTAL NUMBER OF SYSTEMS



Religions	
B	Baptist
C	Christian
CA	Catholic
CH	Christian and Missionary Alliance
D	Dutch Reformed
DC	Disciples of Christ Church
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

### Analysis of the Data: Affiliations

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



## 4-15 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Affordable Housing

#### 4-15a LZ 150 PROVIDERS OF HOUSING, RANKED BY TOTAL AFFORDABLE HOUSING UNITS

LZ 150 AH Rank	2014 Rank	System Name	State	Units	Communities
1	34	National Church Residences	OH	18,910	238
2	6	Retirement Housing Foundation	CA	11,031	122
3	21	Volunteers of America	VA	9,974	166
4	51	be.group	CA	2,694	26
5	14	Cornerstone Affiliates	CA	2,426	32
6	77	Presby's Inspired Life	PA	2,103	27
7	76	United Church Homes, Inc.	OH	2,074	49
8	11	Westminster Communities of Florida	FL	2,032	10
9	25	Springpoint Senior Living, Inc.	NJ	1,755	18
10	1	Evangelical Lutheran Good Samaritan Society	SD	1,351	32
11	52	Presbyterian Villages of Michigan	MI	1,064	22
12	9	Pacific Retirement Services	OR	1,045	24
13	66	Presbyterian SeniorCare	PA	999	22
14	12	Presbyterian Senior Living	PA	983	14
15	130	Christian Care Communities, Inc.	KY	783	5
16	35	Hebrew SeniorLife	MA	766	3
17	116	Lutheran Homes Society	OH	651	12
18	39	Episcopal Senior Communities	CA	626	6
19	68	Northern California Presbyterian Homes and Services, Inc.	CA	600	3
20	123	Lutheran Social Ministries of New Jersey	NJ	498	7
21	32	Jewish Home Lifecare	NY	482	4
22	10	Lutheran Senior Services	MO	459	6
23	19	Ecumen	MN	372	7
24	59	Phoebe Ministries	PA	356	8
25	48	Greencroft Communities	IN	352	2
26	105	Lutheran Social Services of Michigan	MI	340	5
27	22	Diakon Lutheran Social Ministries	PA	335	4
28	104	Methodist Retirement Communities	TX	319	5
29	44	Mississippi Methodist Senior Services, Inc.	MS	313	0
30	72	United Methodist Homes of New Jersey	NJ	300	5
31	4	Presbyterian Homes and Services	MN	293	3

Note: Additional Affordable Housing listings in Chapter 6.

## 4-15 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Affordable Housing

#### 4-15a LZ 150 PROVIDERS OF HOUSING, RANKED BY TOTAL AFFORDABLE HOUSING UNITS

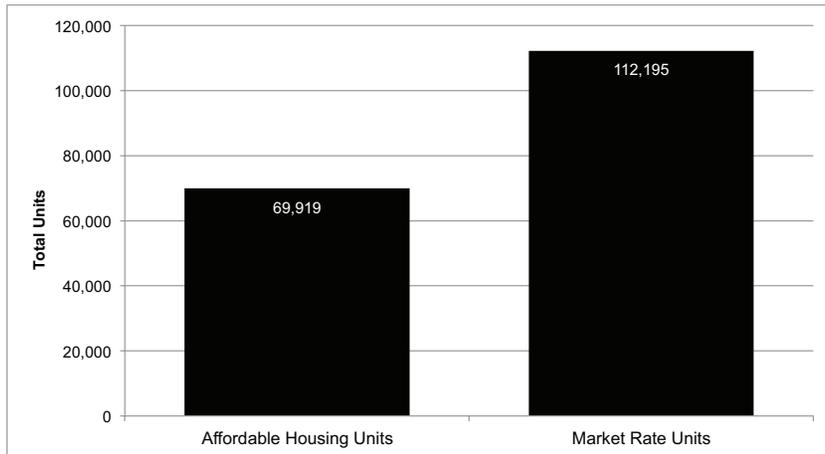
LZ 150 AH Rank	2014 Rank	System Name	State	Units	Communities
32	145	Porter Hills Retirement Communities and Services	MI	270	6
33	29	Christian Care Companies	AZ	247	3
34	124	Maple Knoll Communities, Inc.	OH	243	3
35	140	Sholom Community Alliance	MN	241	3
36	112	Wellspring Lutheran Services (fka Lutheran Homes of Michigan)	MI	231	5
37	41	Loretto	NY	208	7
38	98	Givens Estates	NC	178	2
39	38	Providence Life Services	IL	161	2
40	79	United Church Homes and Services	NC	150	4
41	67	Sears Methodist Retirement System, Inc.	TX	149	2
42	26	Franciscan Communities, Inc.	IL	139	3
43	17	Christian Homes, Inc.	IL	127	3
44	13	Ohio Presbyterian Retirement Services	OH	125	0
45	65	Lutheran Social Services of South Central Pennsylvania	PA	107	3
46	43	Presbyterian Homes	IL	105	3
47	15	Front Porch Communities and Services	CA	100	1
48	73	Wesley Enhanced Living	PA	100	3
49	91	Living Branches	PA	100	1
50	93	Simpson Senior Services	PA	81	2
51	114	Albright Care Services	PA	75	1
52	120	Masonic Homes of Kentucky	KY	70	1
53	139	Lutheran Social Services of the South, Inc.	TX	68	1
54	148	Baptist Life Communities	KY	58	1
55	63	Lutheran SeniorLife	PA	55	1
56	36	Elim Care, Inc.	MN	48	1
57	110	Eventide	MN	46	1
58	109	Christian Living Communities	CO	40	1
59	132	Asbury Inc.	TN	36	1
60	87	Oakwood Lutheran Senior Ministries	WI	30	1
61	81	The United Methodist Retirement Homes, Inc.	NC	24	1
62	37	Eskaton	CA	21	1

Note: Additional Affordable Housing listings in Chapter 6.

## 4-15 2014 LeadingAge Ziegler 150

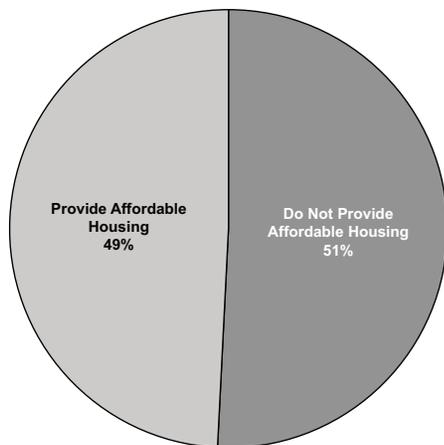
### Organizational Characteristics: Affordable Housing

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



### Organizational Characteristics: Affordable Housing

#### 4-15c PERCENTAGE OF LZ 150 PROVIDING HOUSING



## 4-16 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Managed Units & Communities

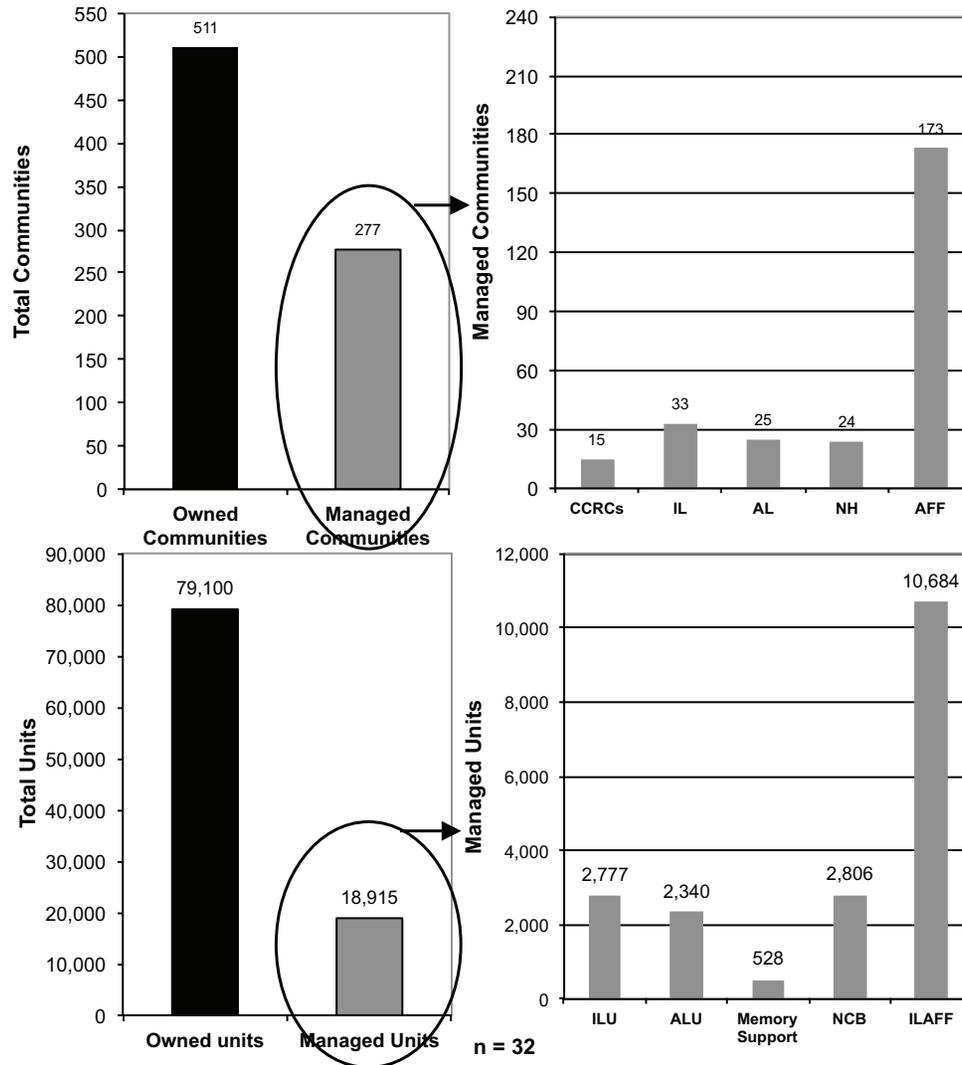
#### 4-16a LZ 150 PROVIDERS THAT MANAGE, RANKED BY MANAGED-ONLY UNITS

LZ 150 Managed Rank	2014 LZ 150 Rank	System Name	State	Managed-only	
				Units	Communities
1	34	National Church Residences	OH	3,694	61
2	14	Front Porch Communities and Services	CA	1,937	28
3	37	Eskaton	CA	1,304	5
4	66	Presbyterian SeniorCare	PA	1,260	26
5	19	Ecumen	MN	1,159	22
6	77	Presby's Inspired Life	PA	970	14
7	76	United Church Homes, Inc.	OH	917	11
8	16	Asbury Communities	MD	782	4
9	15	Pacific Retirement Services	OR	764	3
10	6	Retirement Housing Foundation	CA	630	4
11	25	Springpoint Senior Living, Inc.	NJ	557	2
12	1	Evangelical Lutheran Good Samaritan Society	SD	527	11
13	27	Augustana Care	MN	476	11
14	112	Wellspring Lutheran Services	MI	427	13
15	13	Cornerstone Affiliates	CA	399	19
16	38	Providence Life Services	IL	346	1
17	41	Loretto	NY	337	2
18	105	Lutheran Social Services of Michigan	MI	278	8
19	4	Presbyterian Homes and Services	MN	249	3
20	72	United Methodist Homes of New Jersey	NJ	240	4
21	9	Lutheran Senior Services	MO	208	3
22	102	BHI Senior Living, Inc.	IN	199	2
23	55	Masonicare, Inc.	CT	180	1
24	94	Goodwin House Incorporated	VA	161	1
25	144	St. John's Lutheran Ministries	MT	160	1
26	48	Greencroft Communities	IN	154	3
27	50	Bethesda Senior Living Communities	CO	113	1
28	101	Western Home Communities	IA	110	3
29	54	Lutheran Life Communities	IL	105	1
30	26	Franciscan Communities, Inc.	IL	85	1
31	79	United Church Homes and Services	NC	72	2
32	139	Lutheran Social Services of the South, Inc.	TX	68	1
33	68	Northern California Presbyterian Homes and Services, Inc.	CA	54	1
34	21	Volunteers of America	VA	48	1
35	123	Lutheran Social Ministries of New Jersey	NJ	33	2
36	52	Presbyterian Villages of Michigan	MI	22	1

# 4-16 2014 LeadingAge Ziegler 150

## Organizational Characteristics: Managed Units & Communities

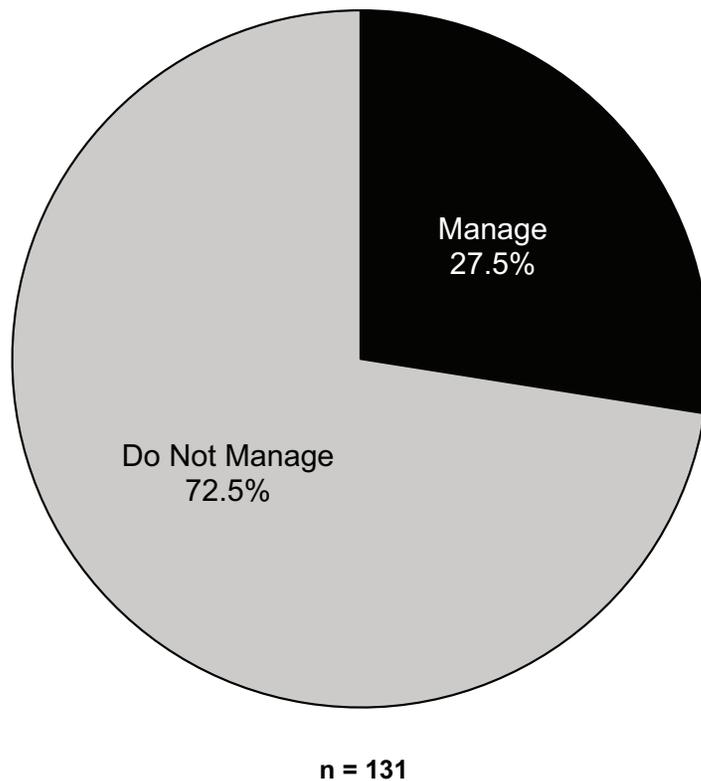
### 4-16b COMPARISON OF OWNED VS. MANAGED COMMUNITIES AND UNITS OF PROVIDERS THAT MANAGE



LeadingAge 150 Ziegler

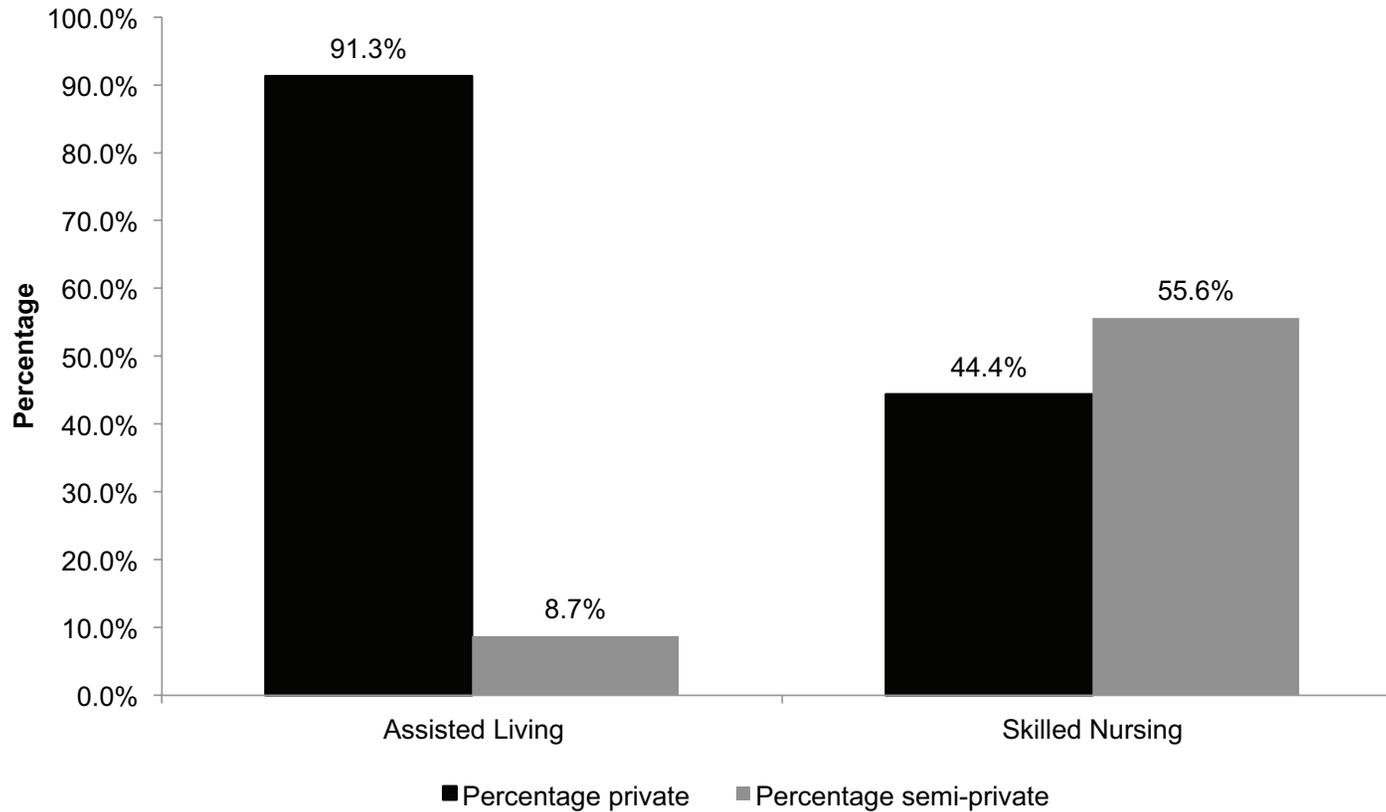
## 4-16 2014 LeadingAge Ziegler 150

Organizational Characteristics: Managed Units & Communities  
4-16c PERCENTAGE OF LZ 150 THAT MANAGE



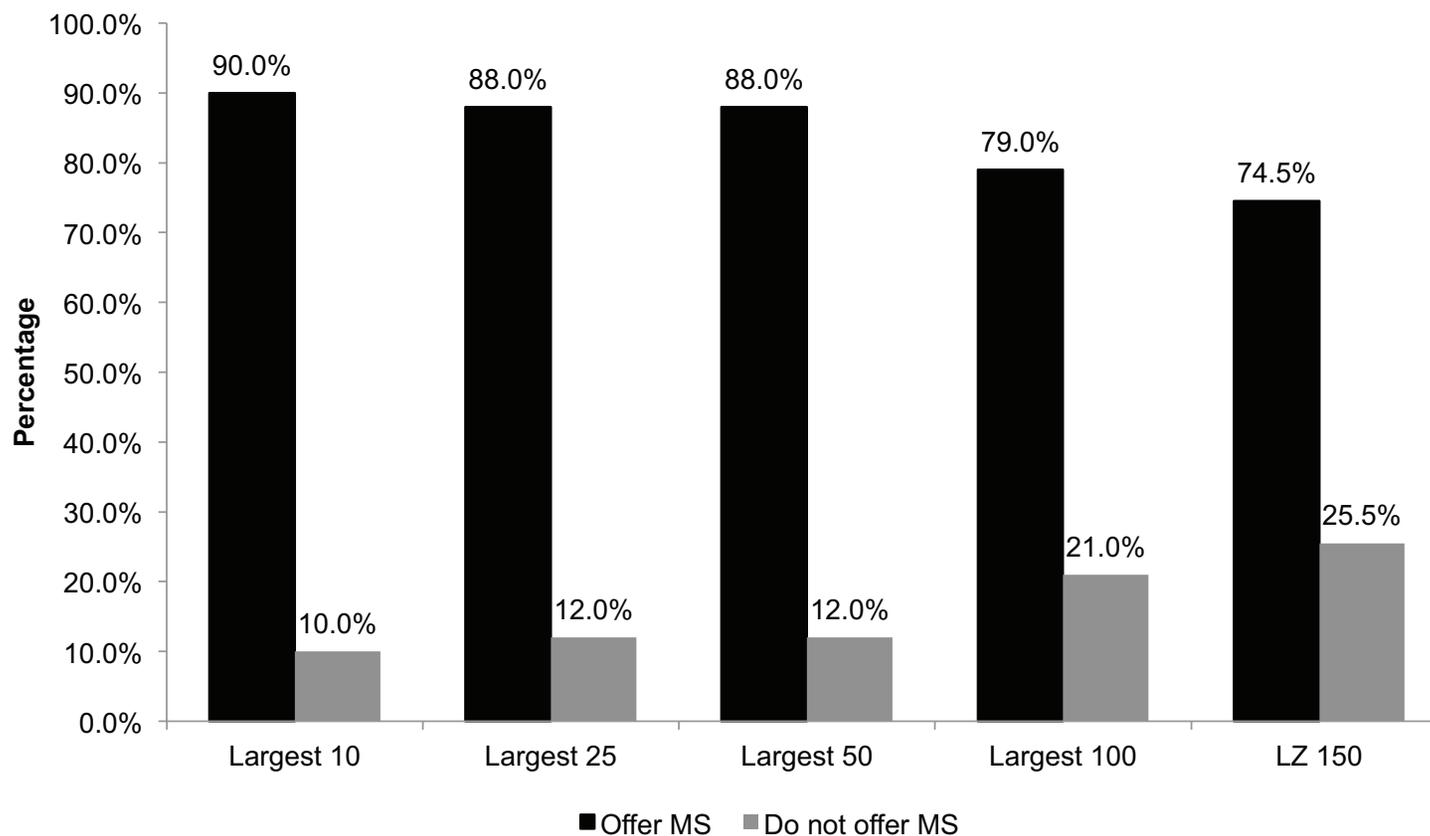
## 4-17 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Assisted and Skilled Composition 4-17a PERCENTAGE OF PRIVATE VERSUS SEMI-PRIVATE UNITS



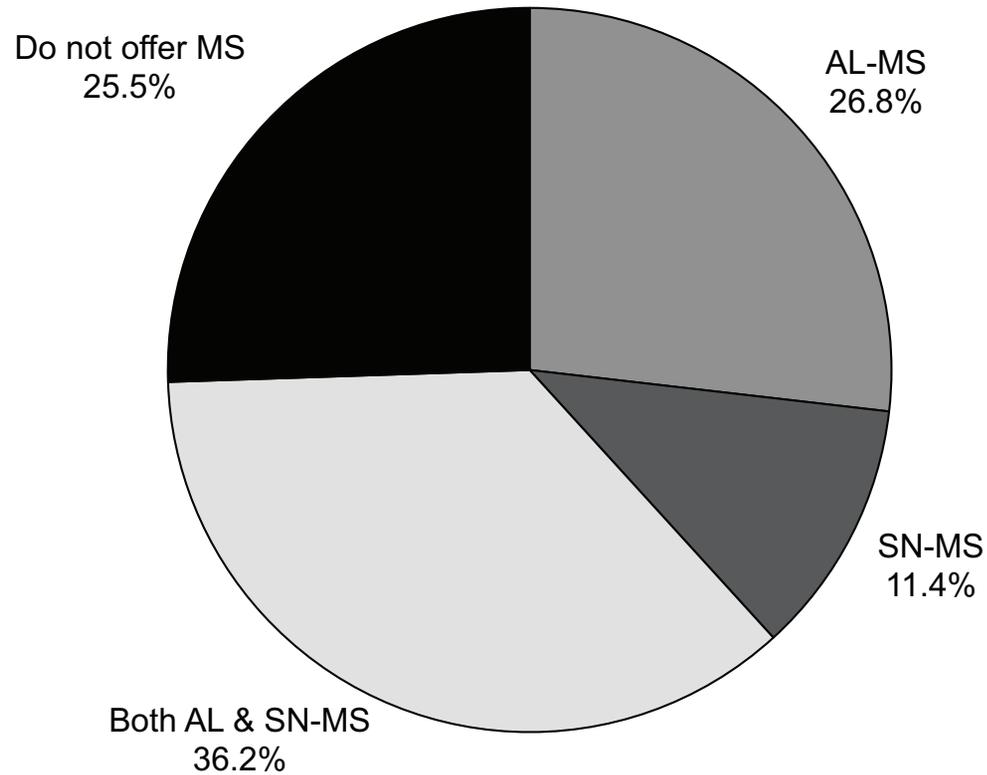
## 4-17 2014 LeadingAge Ziegler 150

Organizational Characteristics: Assisted and Skilled Composition  
4-17b PERCENTAGE OF LZ 150 THAT OFFER MEMORY SUPPORT



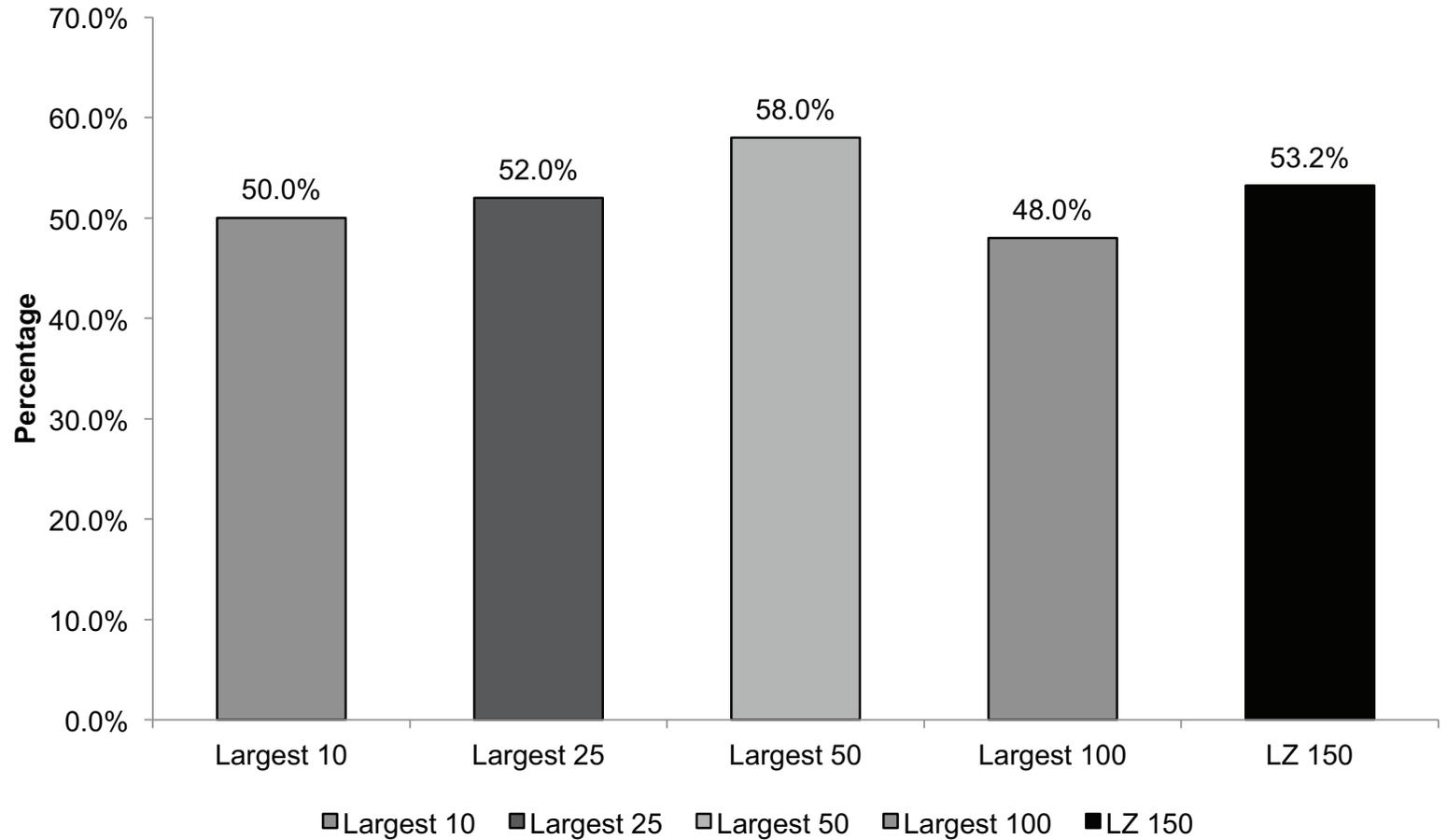
## 4-17 2014 LeadingAge Ziegler 150

Organizational Characteristics: Assisted and Skilled Composition  
4-17c TYPE OF MEMORY SUPPORT OFFERED BY LZ 150



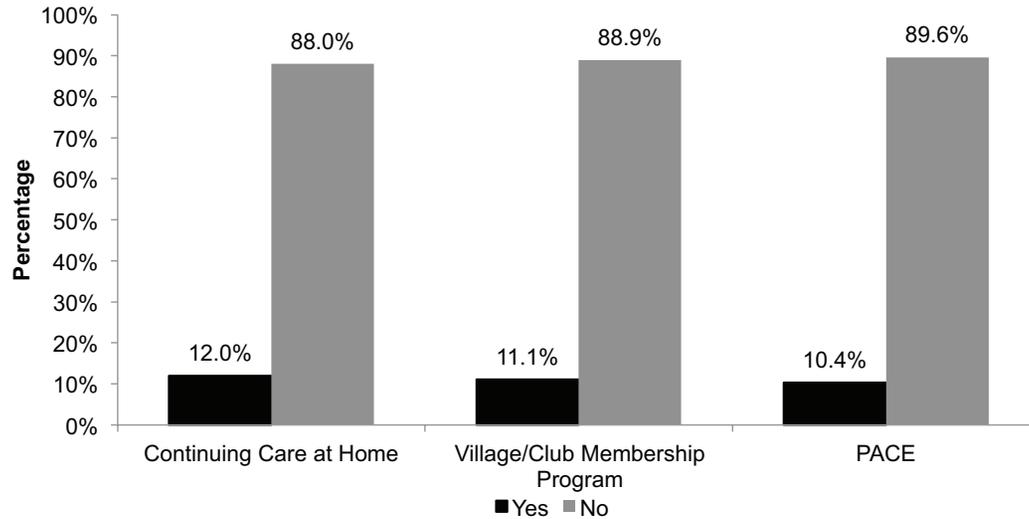
## 4-18 2014 LeadingAge Ziegler 150

Organizational Characteristics: Home & Community-Based Services  
4-18a PERCENTAGE OF LZ 150 THAT OFFER HCBS TO NON-RESIDENTS

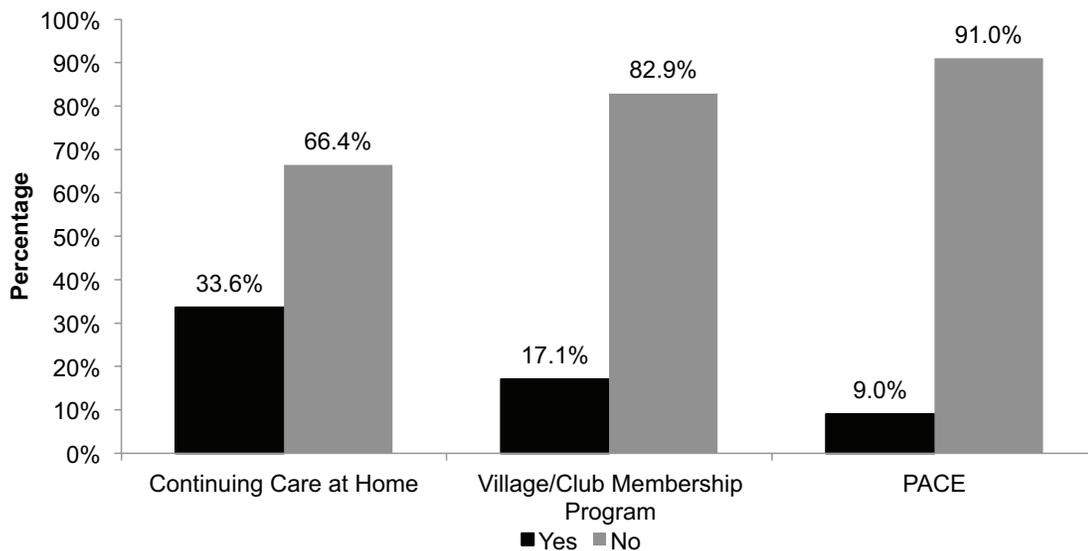


# 4-18 2014 LeadingAge Ziegler 150

## Organizational Characteristics: Home & Community-Based Services 4-18b LZ 150 OFFERING: PACE, CCaH, VILLAGE MODELS



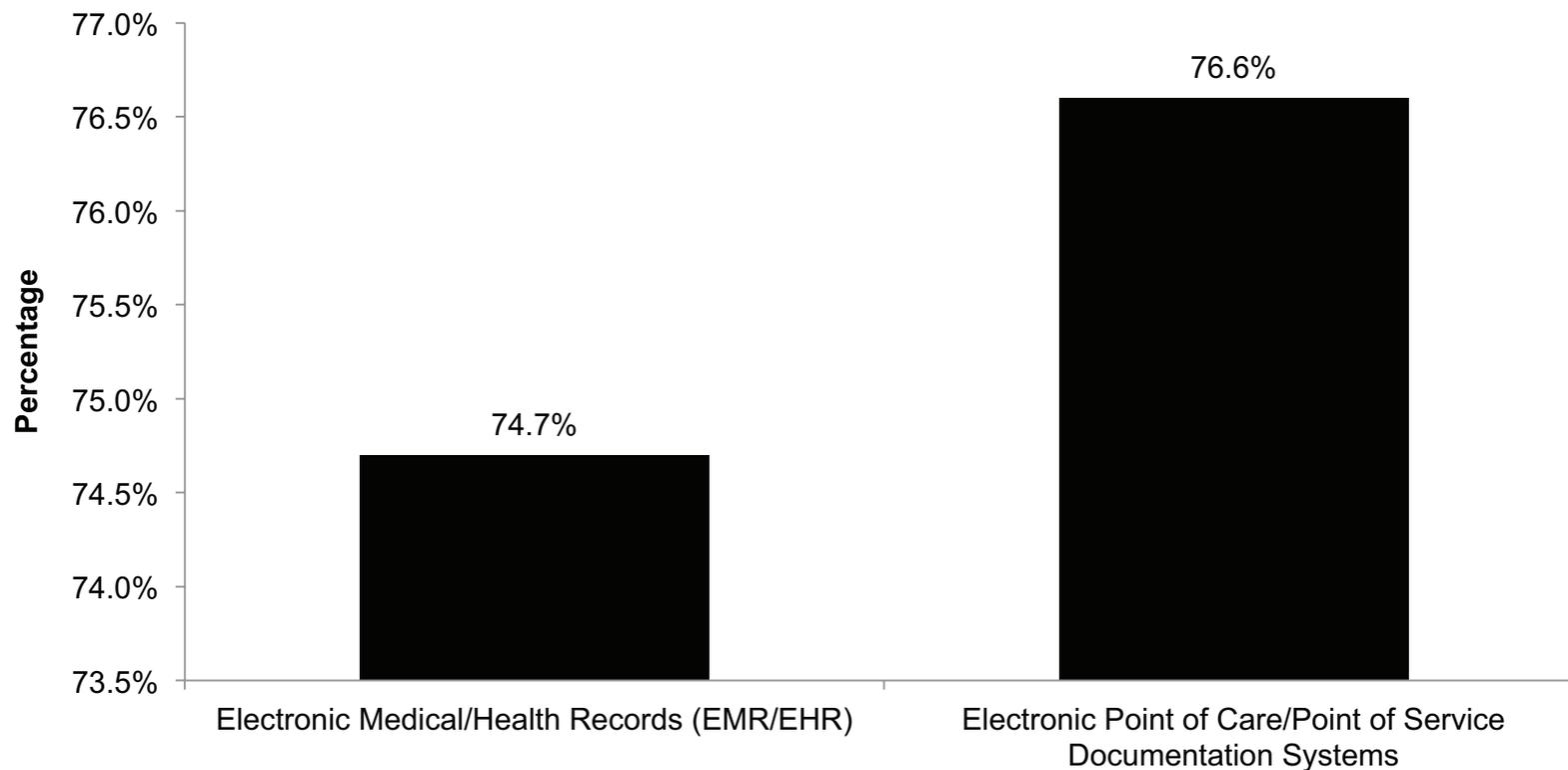
## Organizational Characteristics: Home & Community-Based Services 4-18c LZ 150 PLANS TO OFFER: PACE, CCaH, VILLAGE MODELS



## 4-19 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Technology

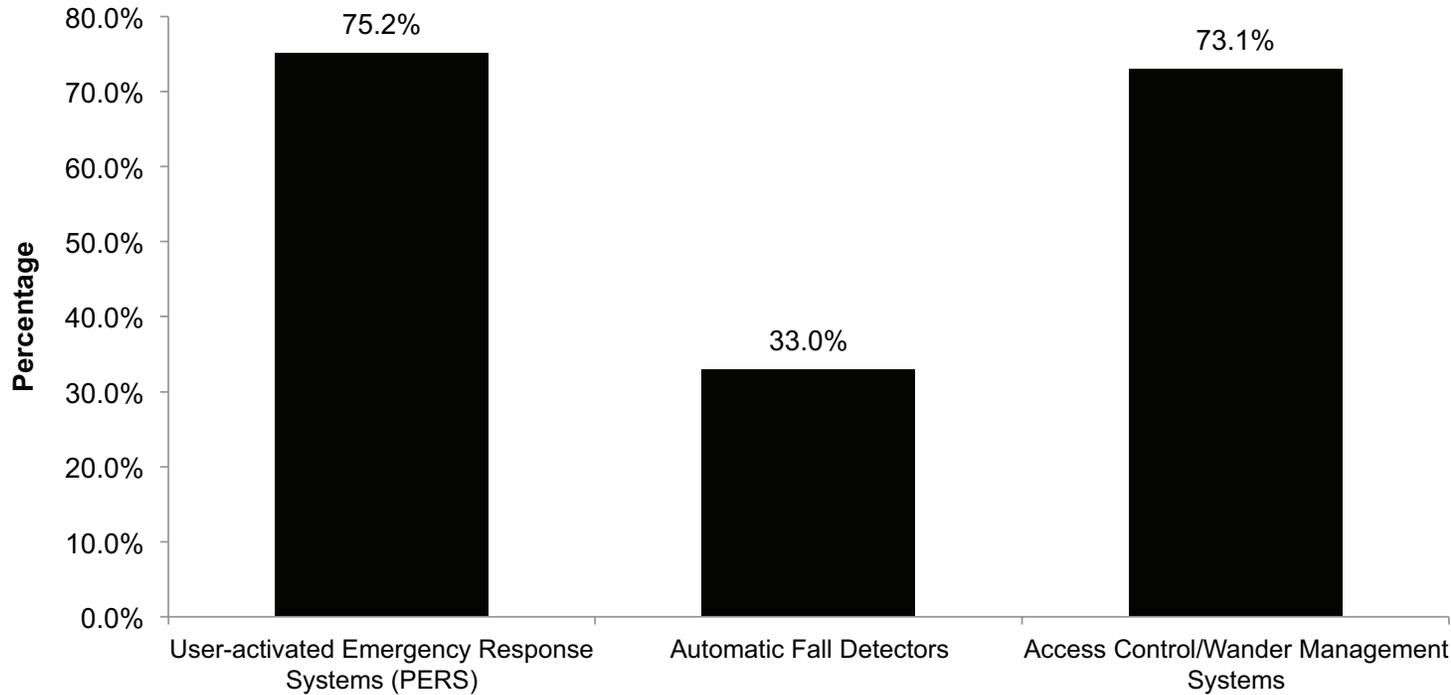
#### 4-19a PERCENTAGE OF LZ150 COMMUNITIES/OPERATIONS USING ELECTRONIC DOCUMENTATION TECHNOLOGIES



## 4-19 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Technology

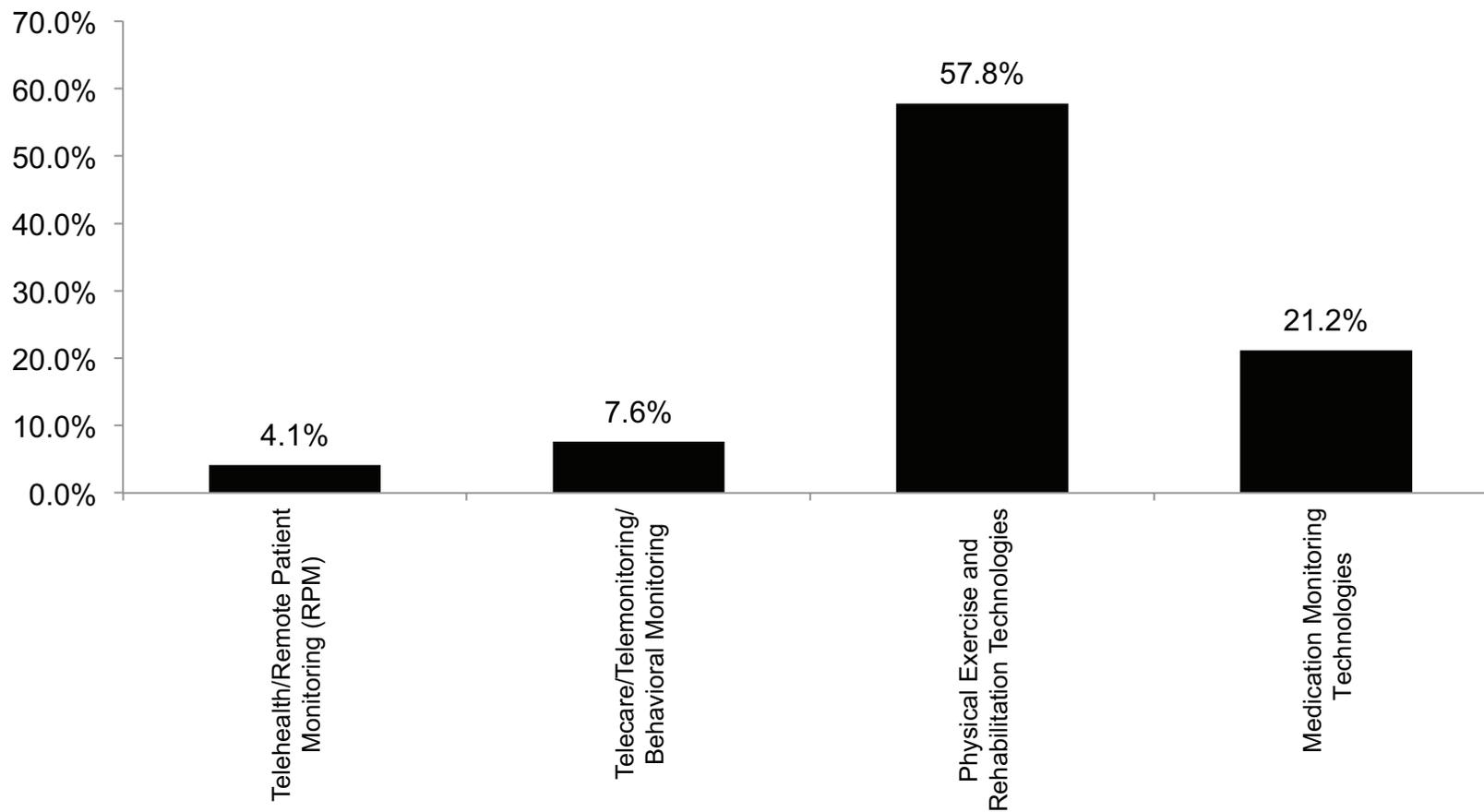
#### 4-19b PERCENTAGE OF LZ150 COMMUNITIES/OPERATIONS USING SAFETY MONITORING TECHNOLOGIES



## 4-19 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Technology

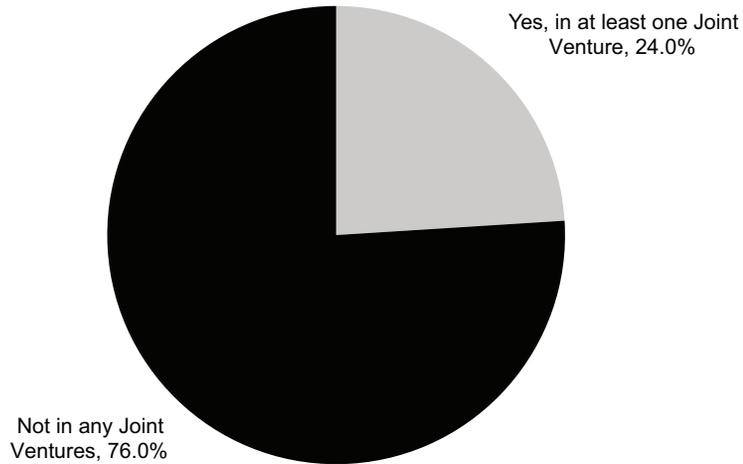
4-19c PERCENTAGE OF LZ150 COMMUNITIES/OPERATIONS USING HEALTH & WELLNESS MONITORING TECHNOLOGIES



## 4-20 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Joint Ventures

#### 4-20a PERCENTAGE OF LZ150 ENGAGED IN A JOINT VENTURE



### Organizational Characteristics: Joint Ventures

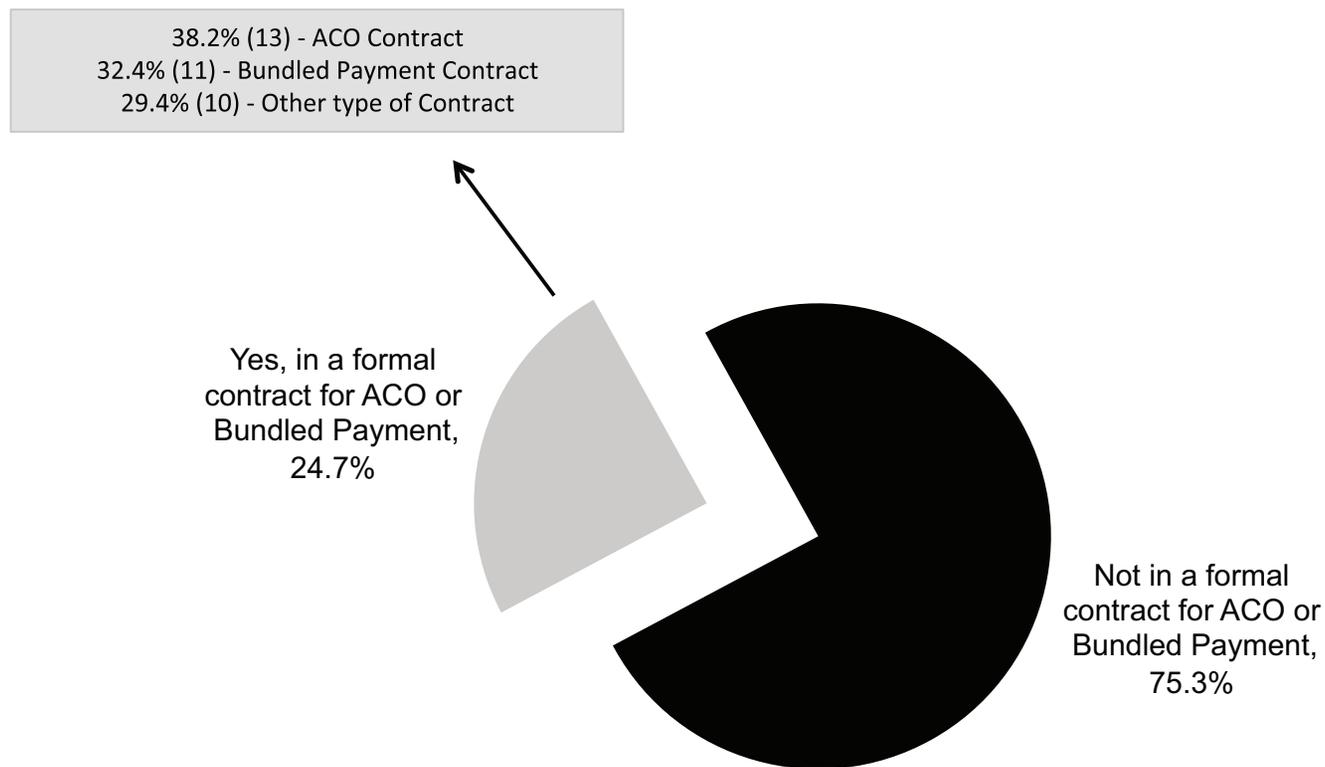
#### 4-20b TYPE OF JOINT VENTURE

Type of JV/With Whom	
Most Mentions	# of Mentions
Another NFP Senior Living Provider	16
Hospital/Health System	15
Home Health/Home Care	14
Rehabilitation/Therapy	6
PACE	5
Pharmacy	4
Hospice	3
Insurance/Risk	3
Builder/Developer	2

## 4-20 2014 LeadingAge Ziegler 150

### Organizational Characteristics: Joint Ventures

#### 4-20c LZ 150 ORGANIZATIONS IN AN ACO, BUNDLED PAYMENT CONTRACT



## Chapter 5

### Growth and Change

This section of the LZ 150 publication is focused on the ways in which the LZ 150 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 150 (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. Chart 5-2b compares organizations ranked three (3) through ten (10) of the LZ 150; 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 150. 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 150 where we have insufficient detail to track historical growth for Pace of Growth charts: ELGSS (LZ 150 #1) and Ecumen (LZ 150 #19). 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.

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.

## Aggregate Growth

Section 5-5 of the report details the pace of growth among the LZ 150 organizations in terms of average annual growth and aggregate growth. These tables list the organizations within the LZ 150 that have increased in size the fastest between 2012 and 2013, between 2000 and 2013 and between 1990 and 2013 (Charts 5-5a-b). They are the leading multi-site organizations in the LZ 150 in terms of aggregate growth rates and total units added in each period.

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

## Future Growth Plans

Arguably, much information can be gathered about potential future growth, whether it be in the form of bricks-and-mortar growth or expanding home and community-based services. For purposes of the LZ 150, feedback is gathered on the intent to grow through affiliation, new campus development or expansion in the next two years. Seventy-five percent (75%) of the LZ 150 reported intentions to expand or reposition an existing campus in 2014 or 2015. With regard to growth via the construction of new communities or growth from affiliation, 32% reported that they intend to grow in this fashion. Another 31% responded "maybe" to this growth in 2014 or 2015.

## 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 150 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 at a new location.

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

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

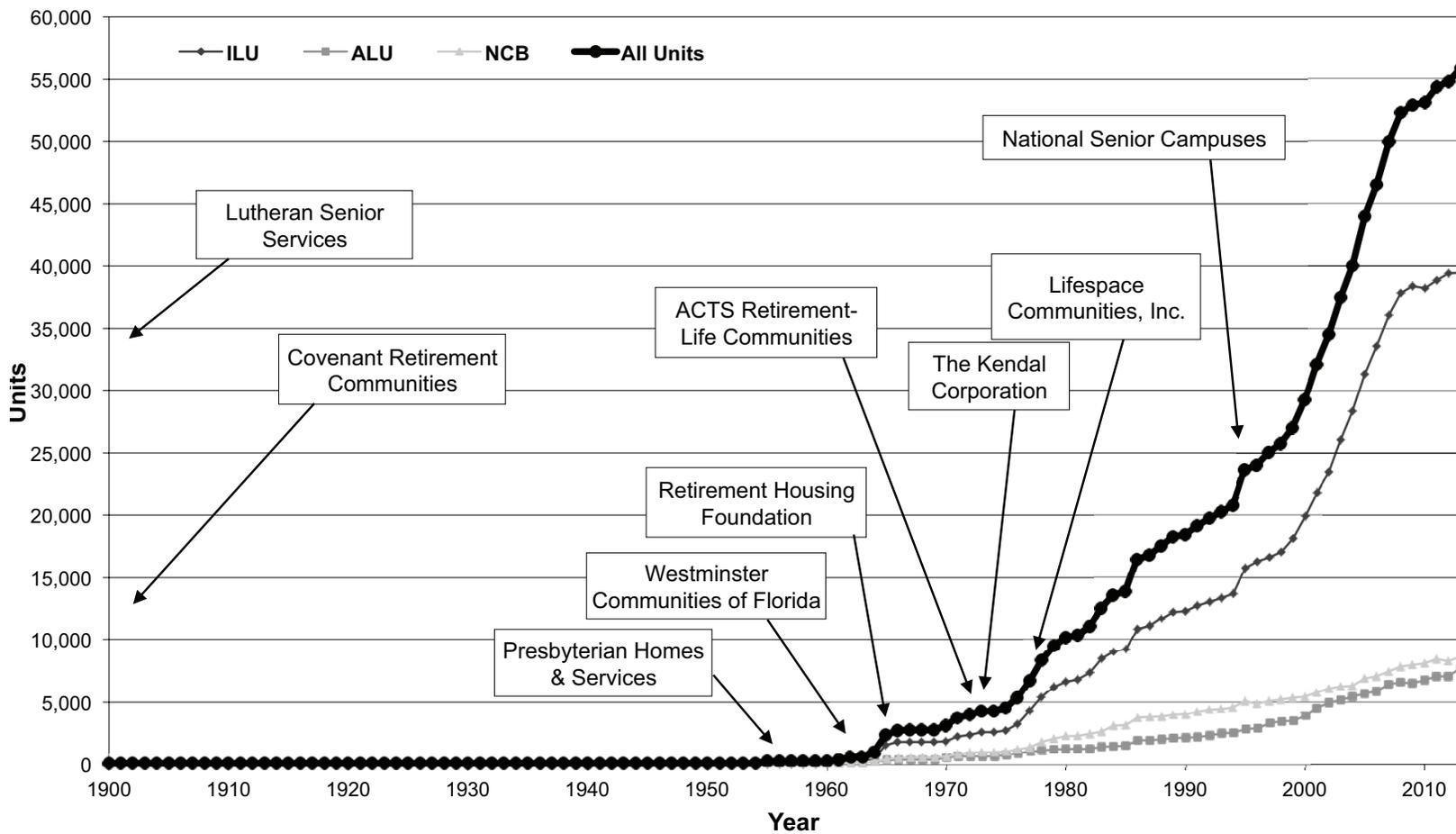
The charts at 5-8a-c analyze how communities have changed through the above-described venues over a 10-, 20- and greater than 30-year time period (1980-2013). More than 1,080 communities have been added as a result of campus expansion since 1980 (Chart 5-8a). Dispositions have also increased dramatically. What appears interesting is that of the 188 community dispositions that occurred from 1980-2013 among the LZ 150, more than 150 of these dispositions occurred in the last decade or so (Chart 5-8c). The most common dispositions in recent years have been free-standing nursing homes or assisted living and financially distressed CCRCs.

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 150 groupings (the largest 10, the largest 25, the largest 50, the largest 100, the largest 150). 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 150 activity through 1/1/14.

## 5-1 2014 LeadingAge Ziegler 150

Growth: Growth of Largest 10 Systems, Combined Unit Mix

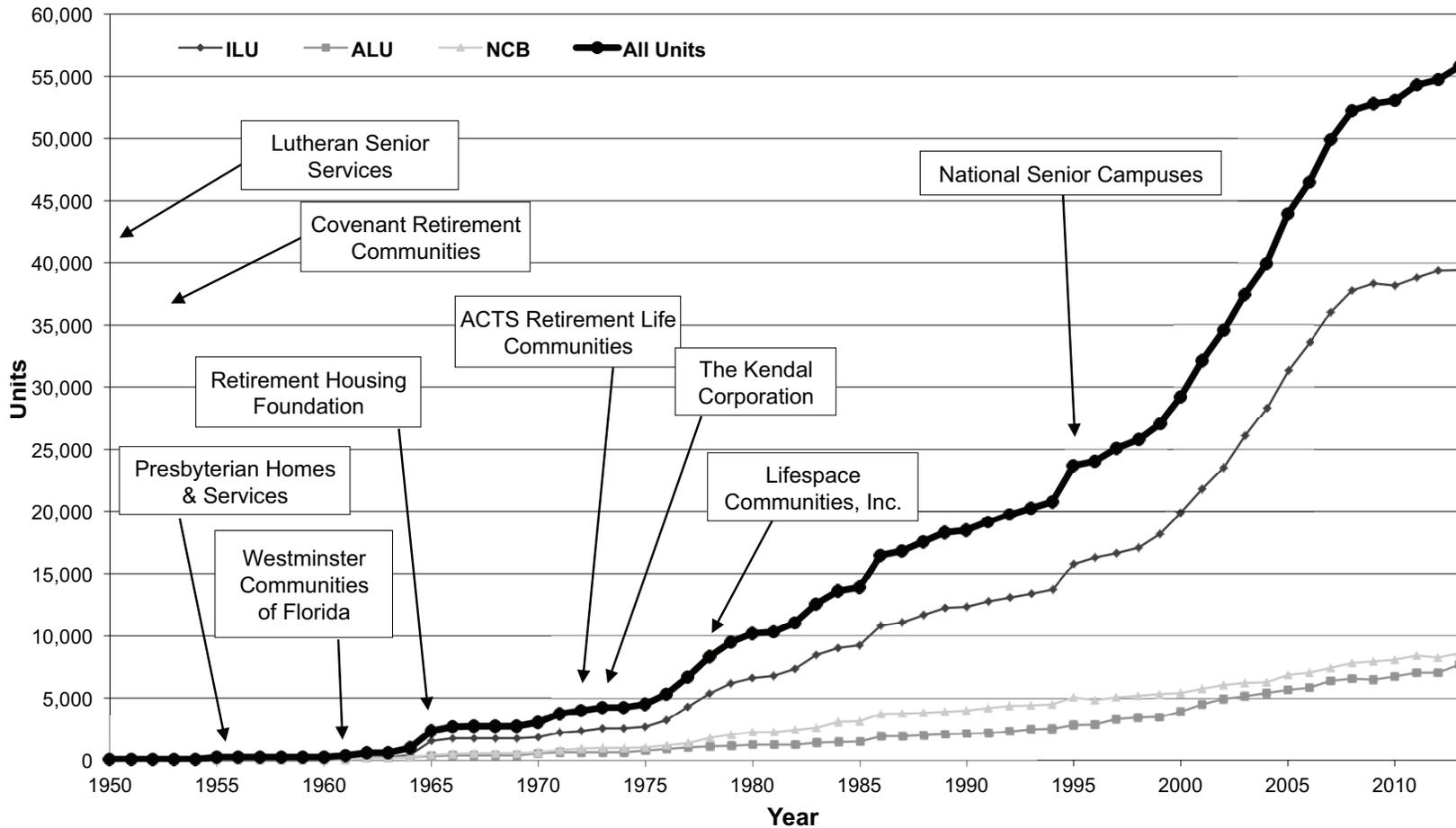
5-1a FROM 1900 (Excludes Evangelical Lutheran Good Samaritan Society)



# 5-1 2014 LeadingAge Ziegler 150

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

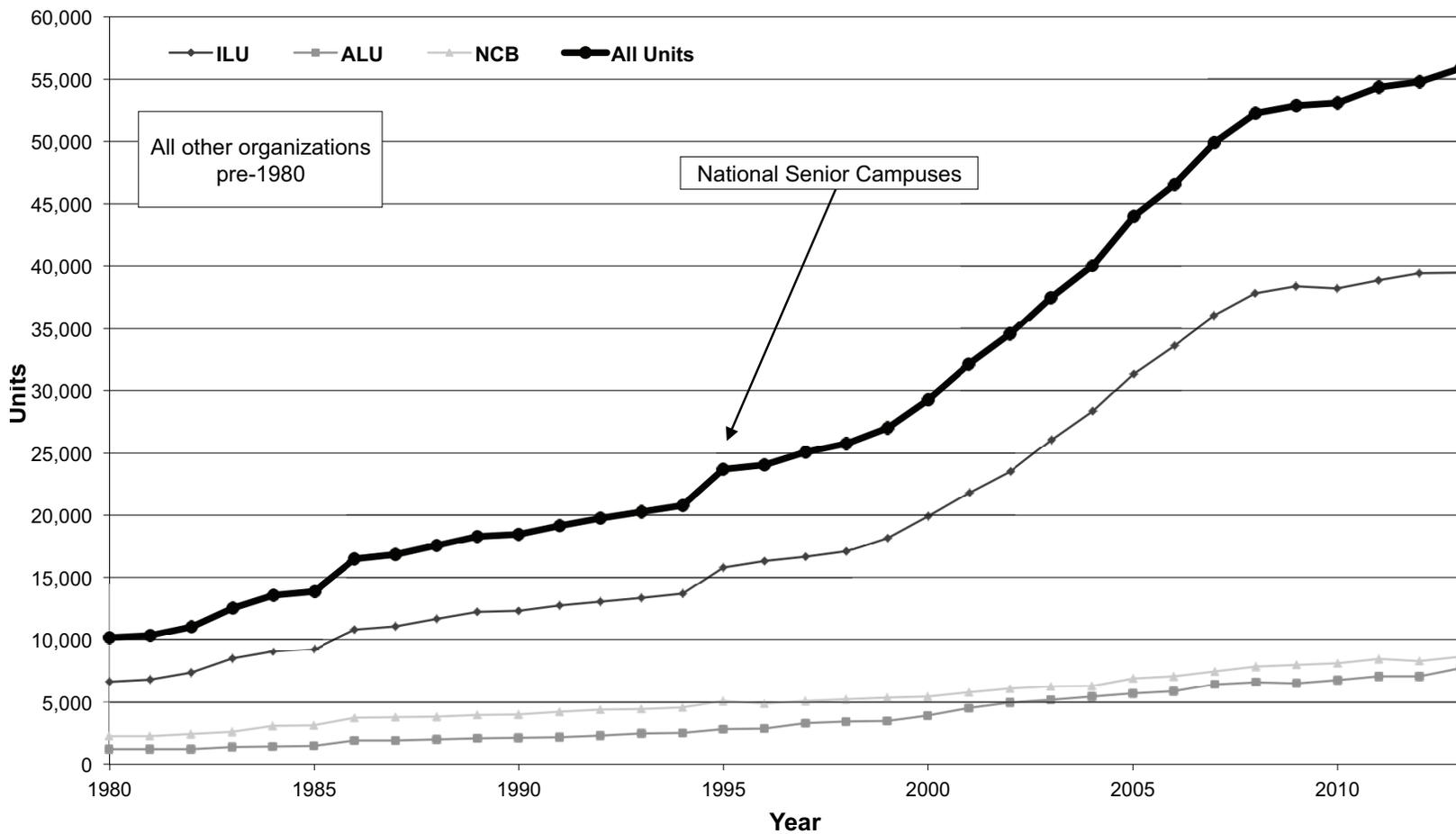
5-1b FROM 1950 (Excludes Evangelical Lutheran Good Samaritan Society)



**LeadingAge 150 Ziegler**

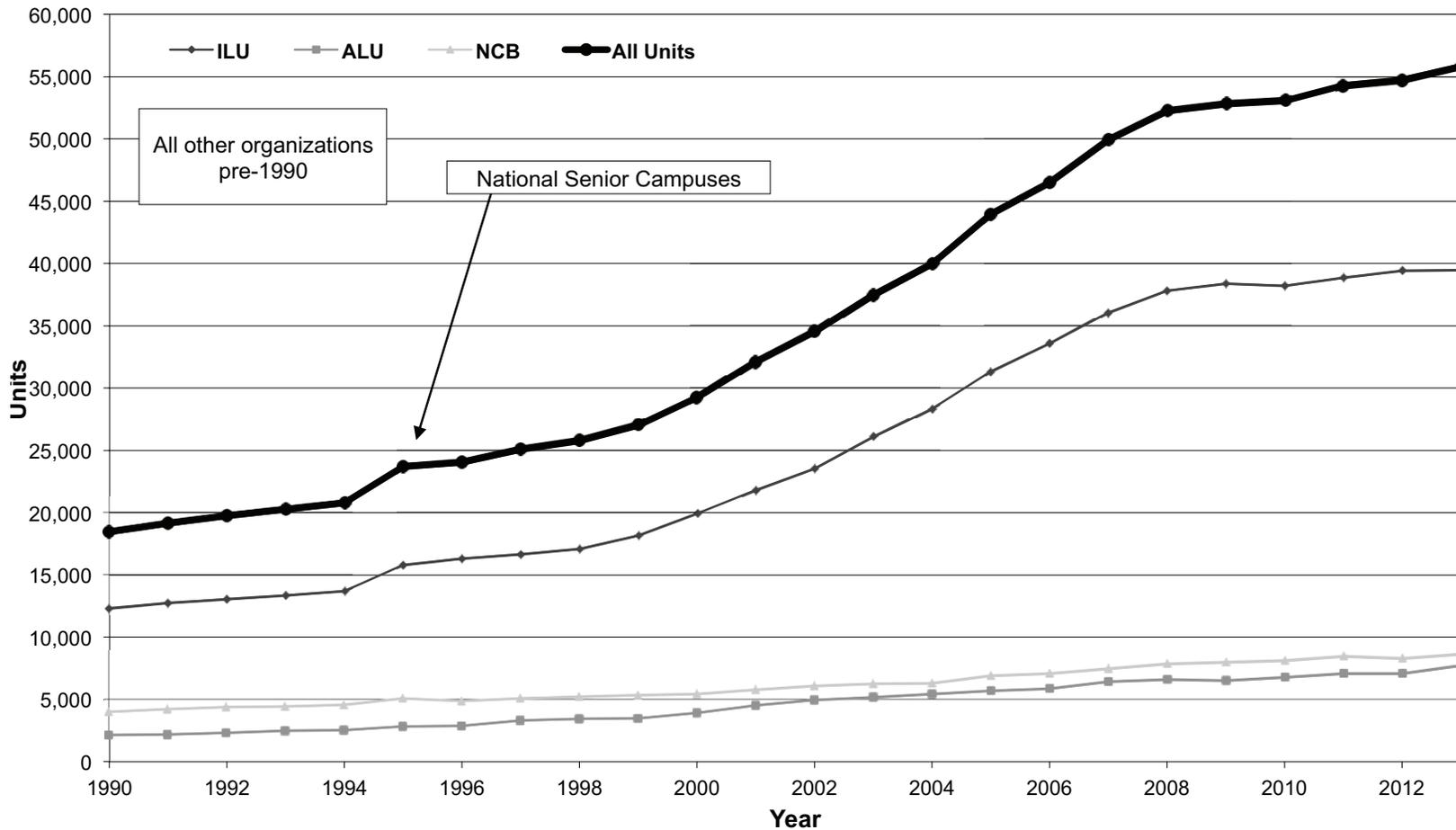
## 5-1 2014 LeadingAge Ziegler 150

Growth: Growth of Largest 10 Systems, Combined Unit Mix  
 5-1c FROM 1980 (Excludes Evangelical Lutheran Good Samaritan Society)



# 5-1 2014 LeadingAge Ziegler 150

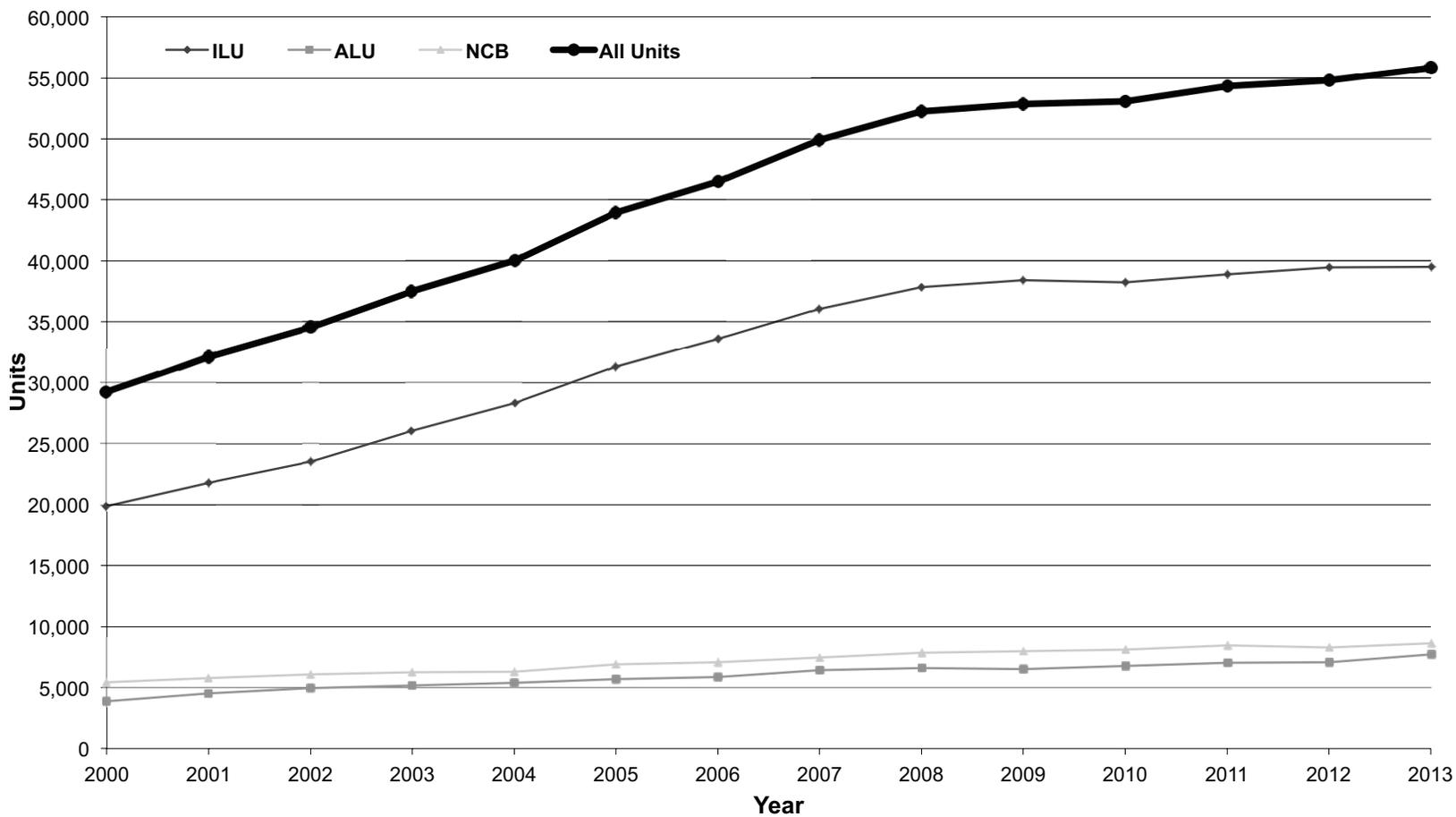
Growth: Growth of Largest 10 Systems, Combined Unit Mix  
 5-1d FROM 1990 (Excludes Evangelical Lutheran Good Samaritan Society)



LeadingAge 150 Ziegler

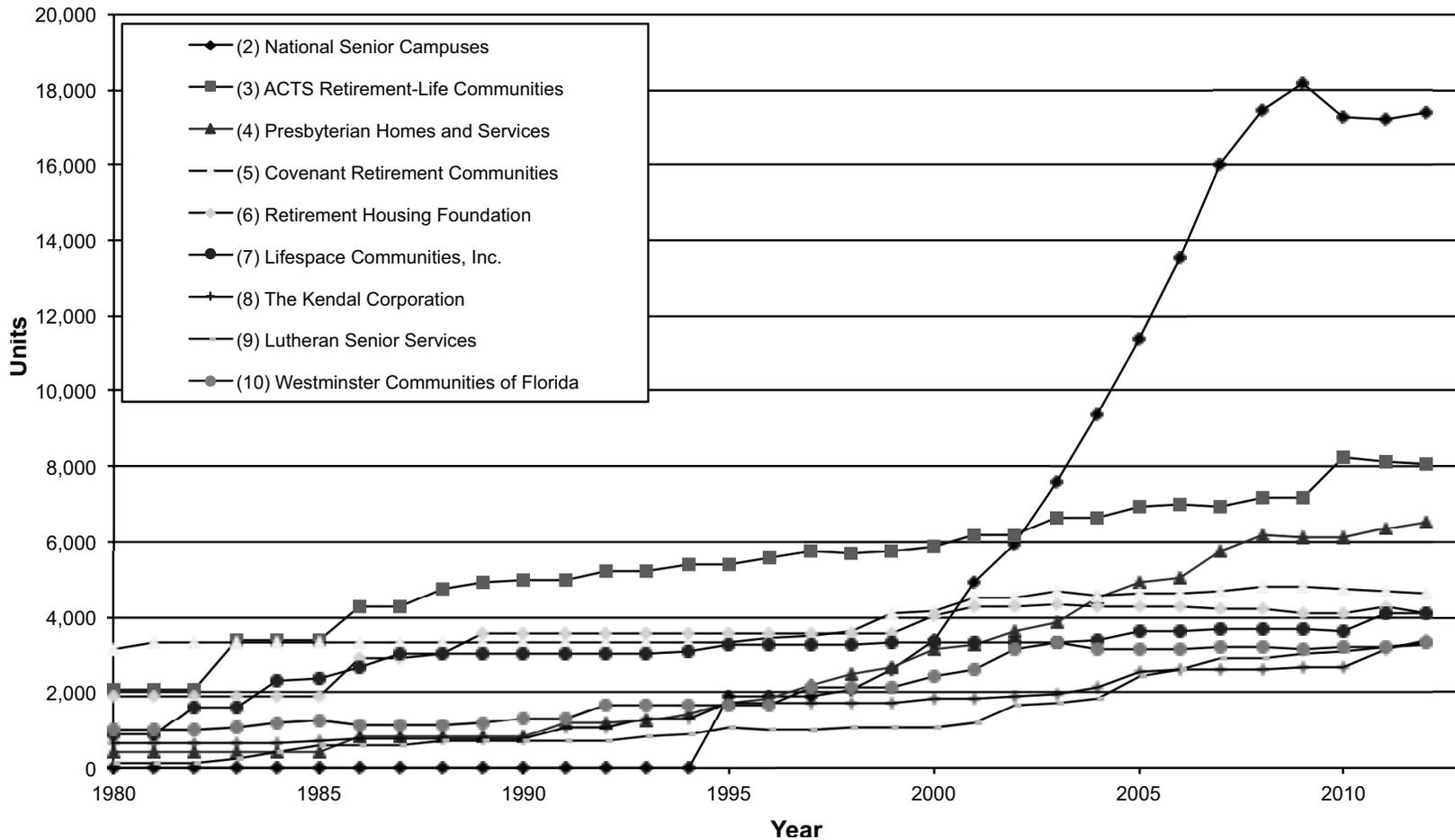
## 5-1 2014 LeadingAge Ziegler 150

Growth: Growth of Largest 10 Systems, Combined Unit Mix  
 5-1e FROM 2000 (Excludes Evangelical Lutheran Good Samaritan Society)



## 5-2 2014 LeadingAge Ziegler 150

Growth: Growth of Total Senior Living Units for Largest 10 Systems  
5-2a 1980 (Excludes Evangelical Lutheran Good Samaritan Society)

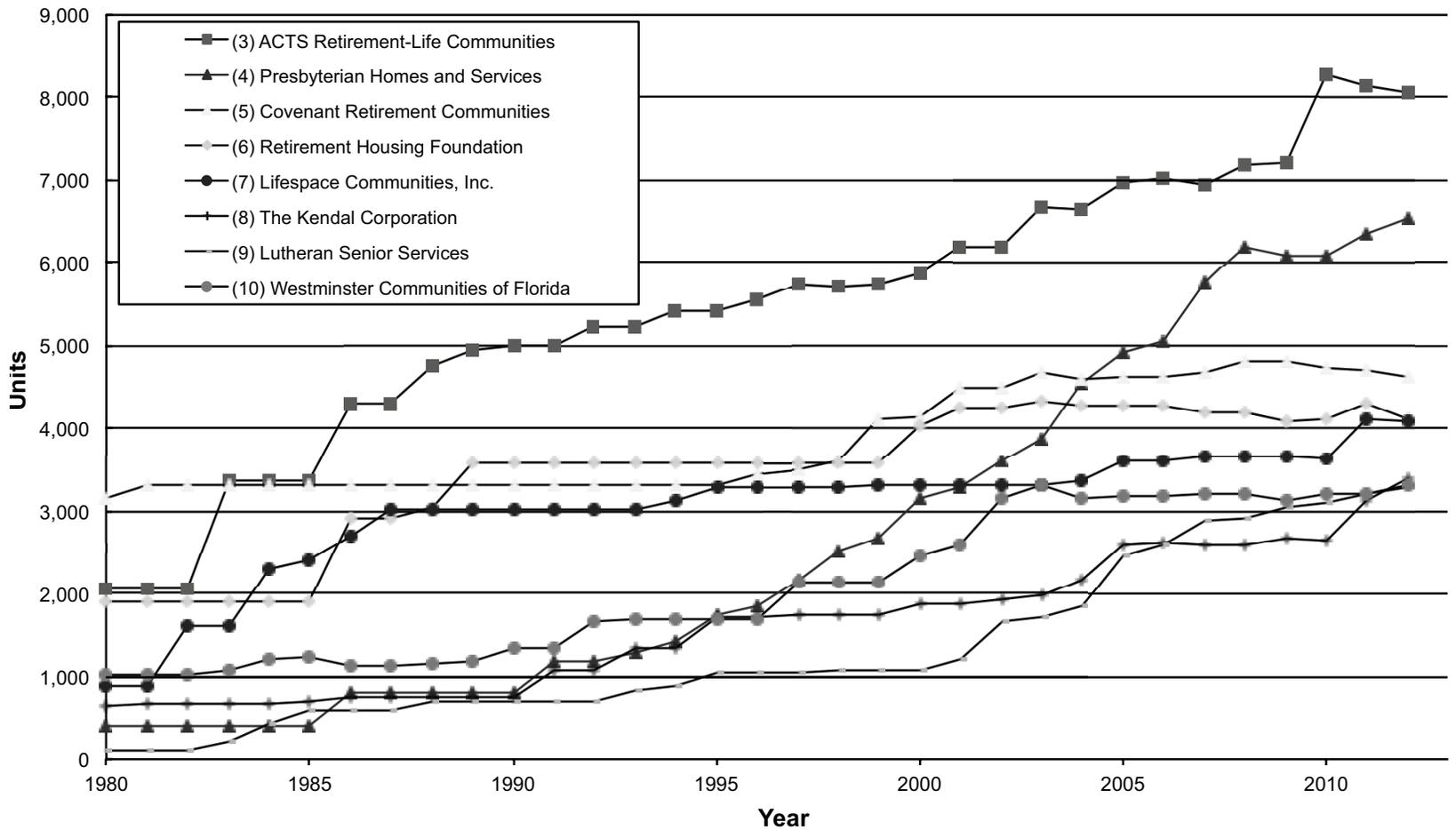


LeadingAge 150 Ziegler

## 5-2 2014 LeadingAge Ziegler 150

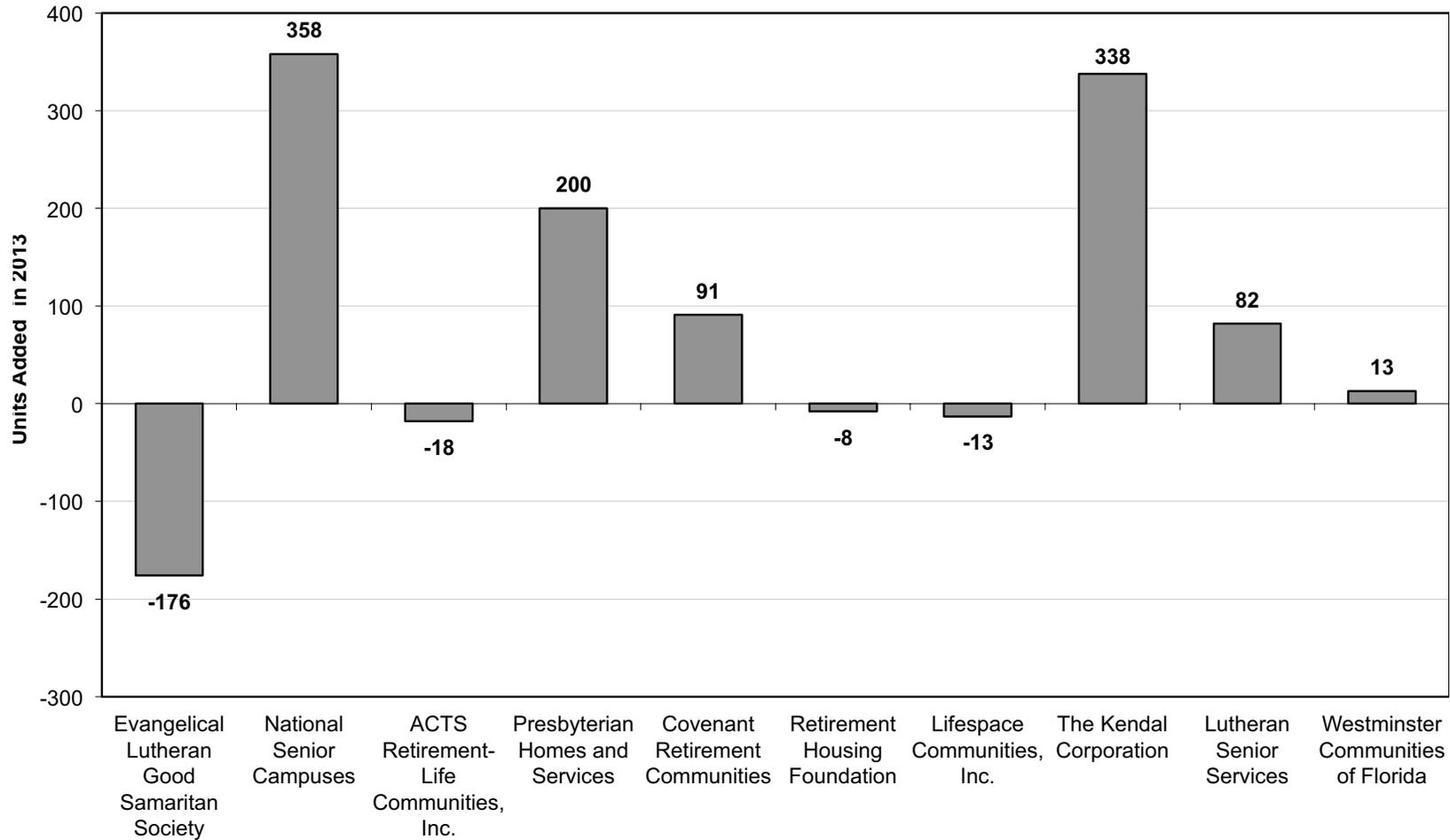
### Growth: Growth of Total Senior Living Units for Largest 10 Systems

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



## 5-3 2014 LeadingAge Ziegler 150

### Growth: Rate of Growth for Largest 10 Systems



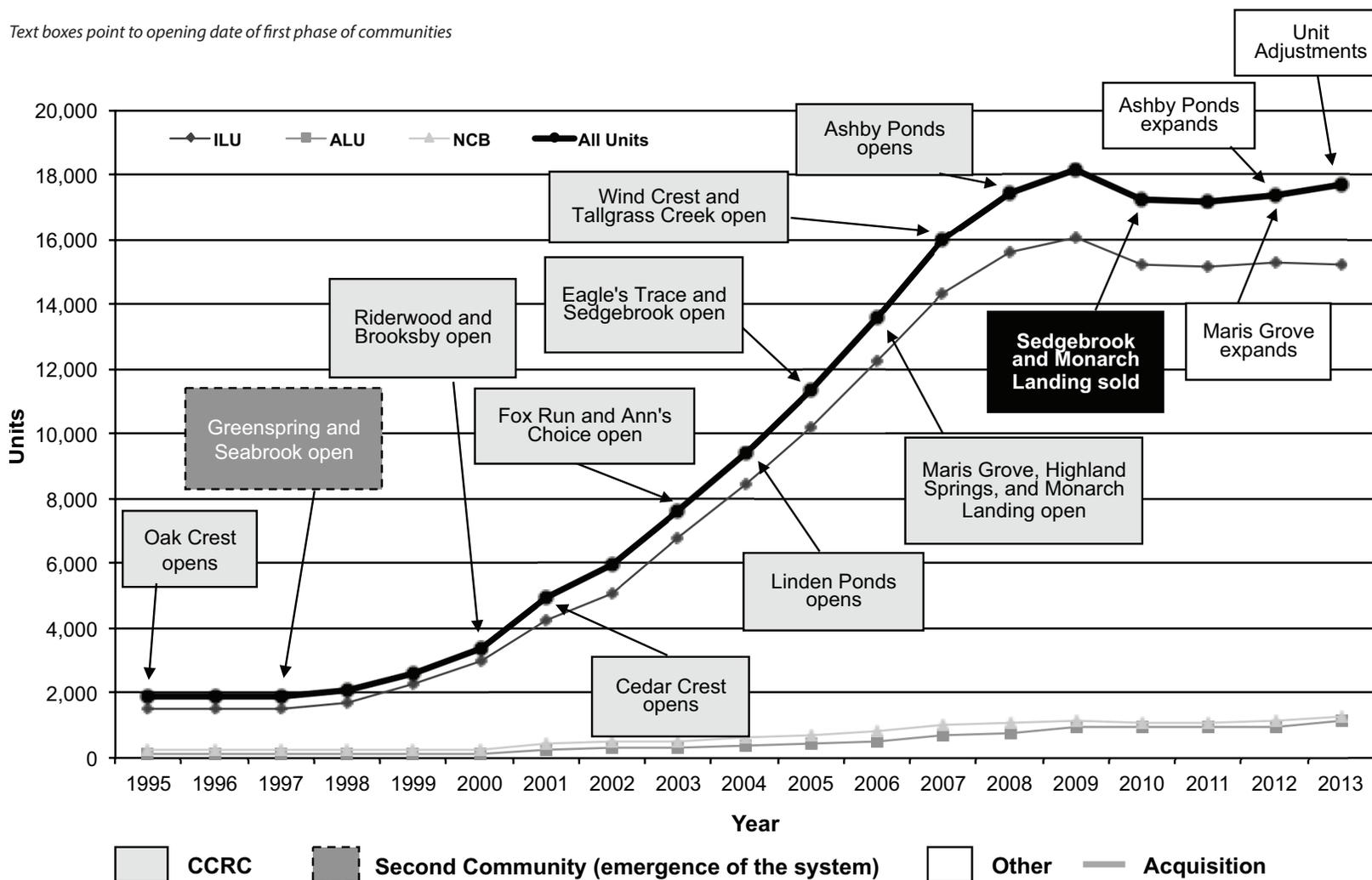
LeadingAge  
**150**  
 Ziegler

## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

#### 5-4a NATIONAL SENIOR CAMPUSES (MD)

Text boxes point to opening date of first phase of communities

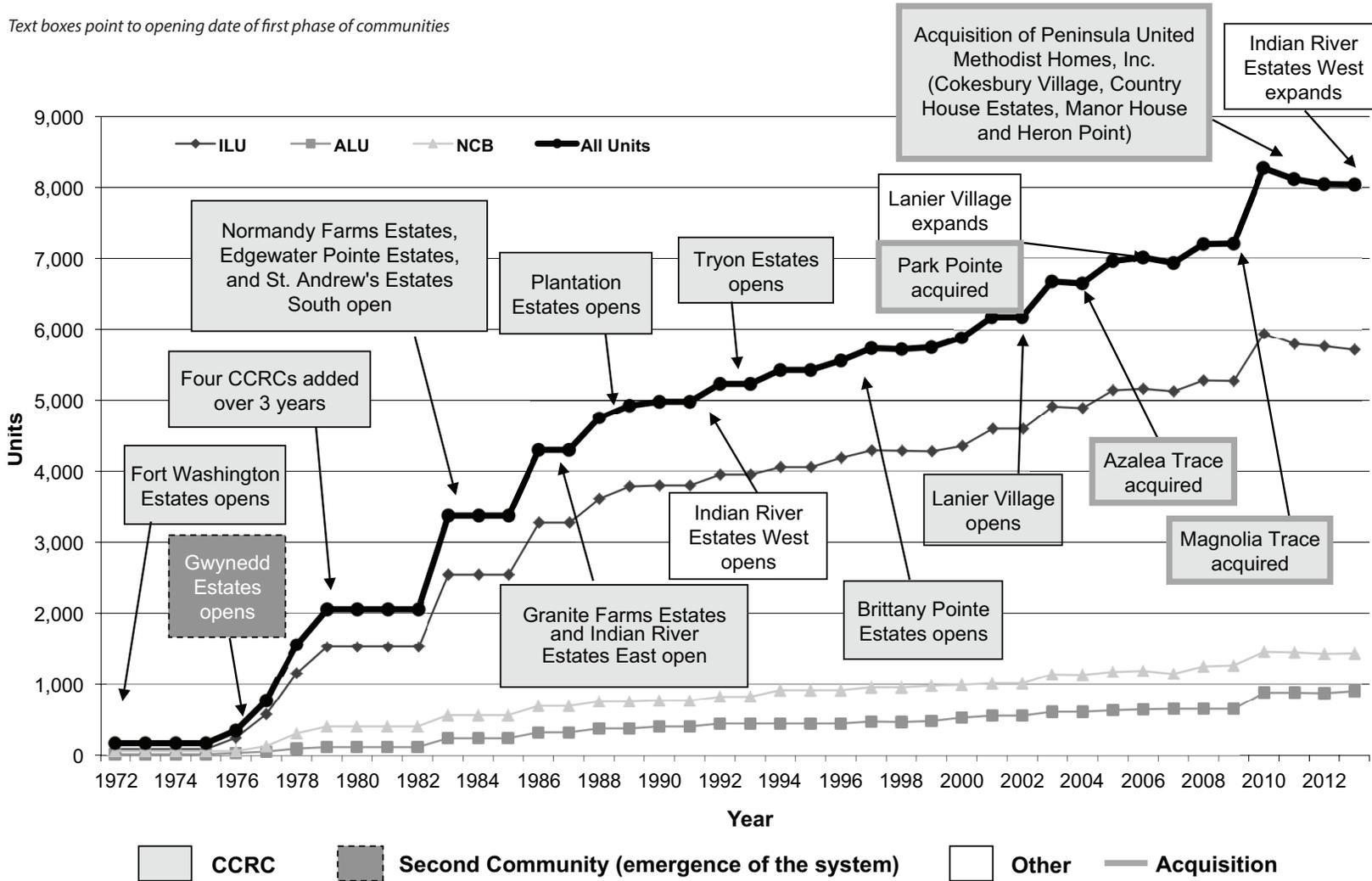


# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth

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

Text boxes point to opening date of first phase of communities



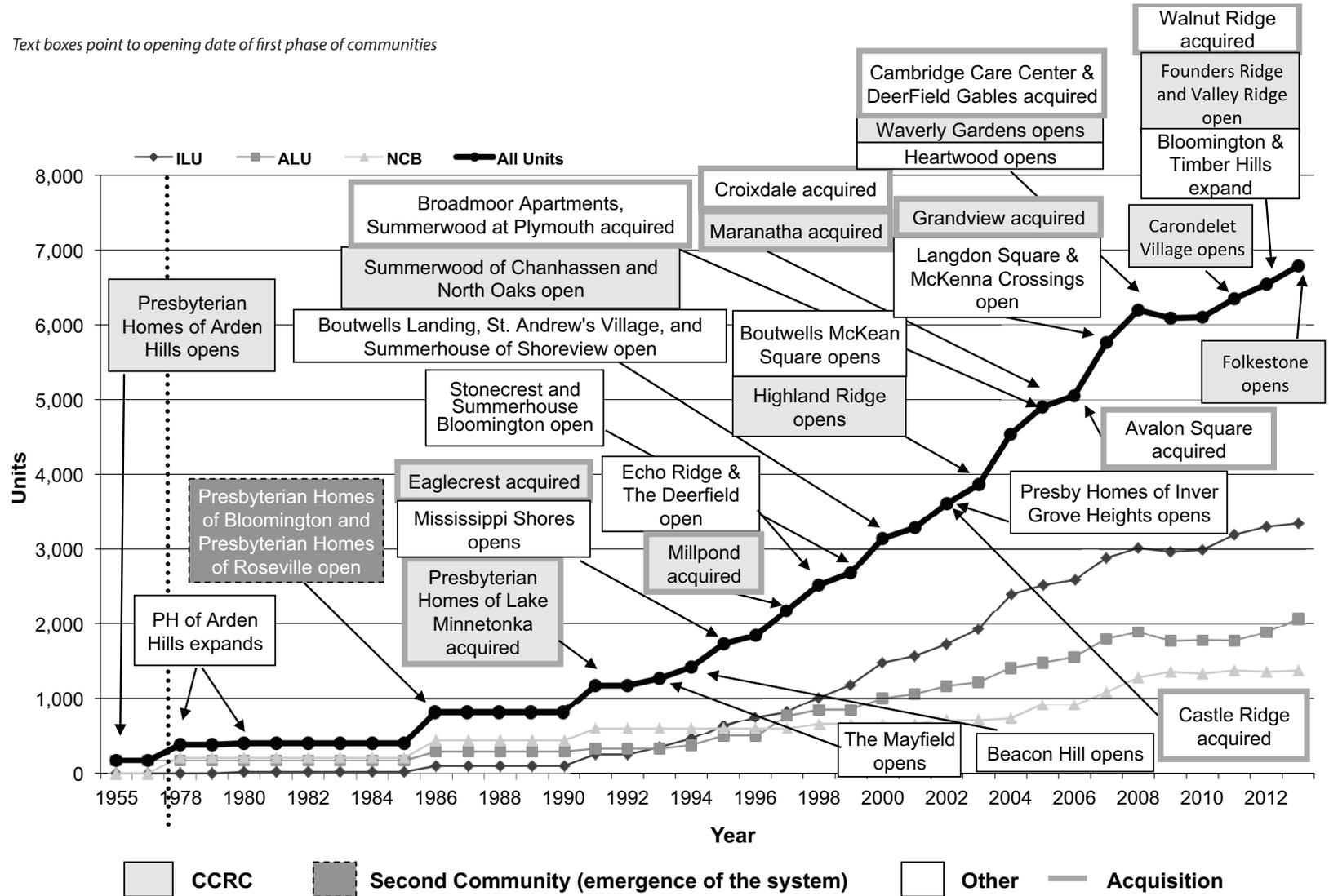
LeadingAge 150 Ziegler

## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

#### 5-4c PRESBYTERIAN HOMES AND SERVICES (MN)

Text boxes point to opening date of first phase of communities

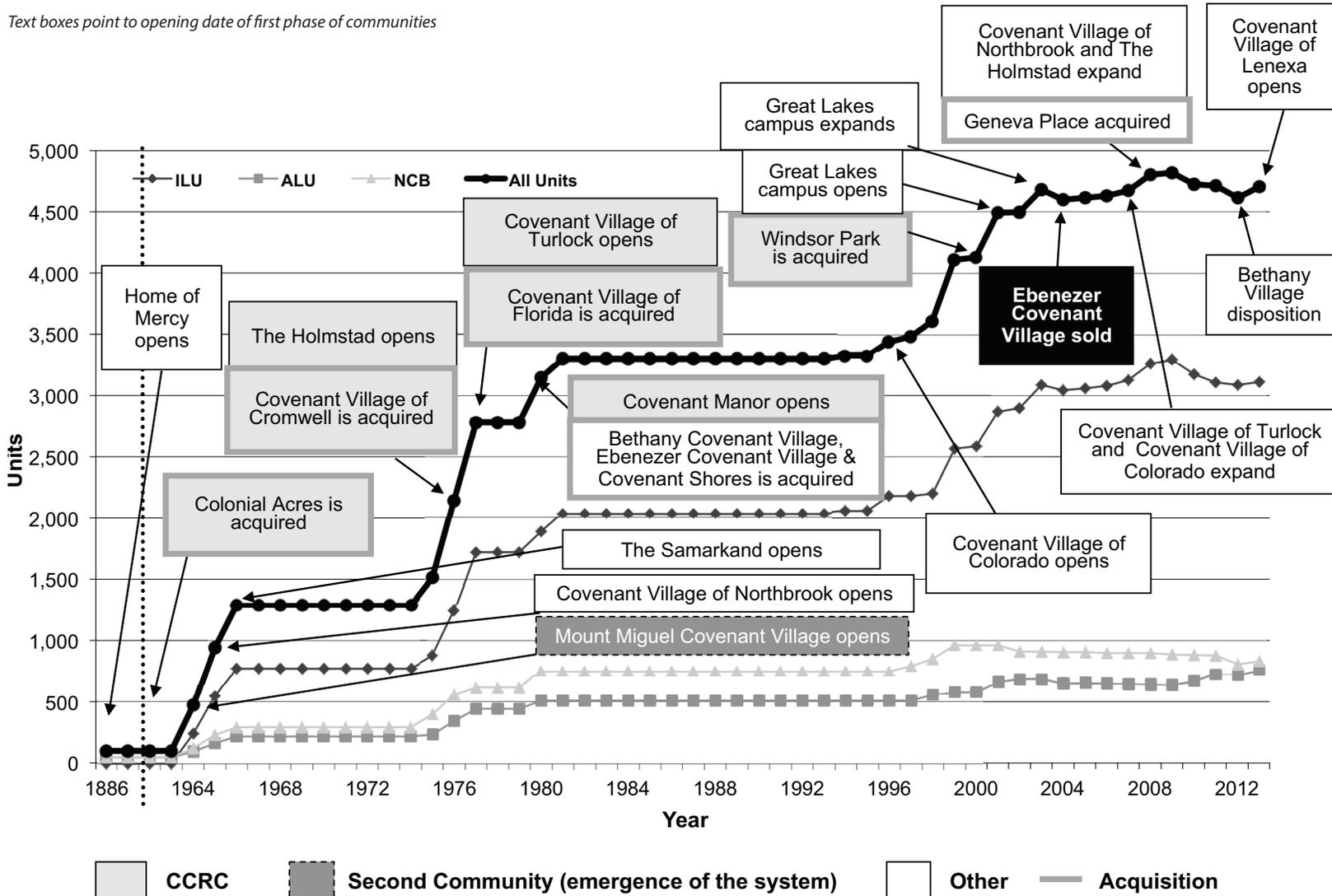


# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth

### 5-4d COVENANT RETIREMENT COMMUNITIES (IL)

Text boxes point to opening date of first phase of communities

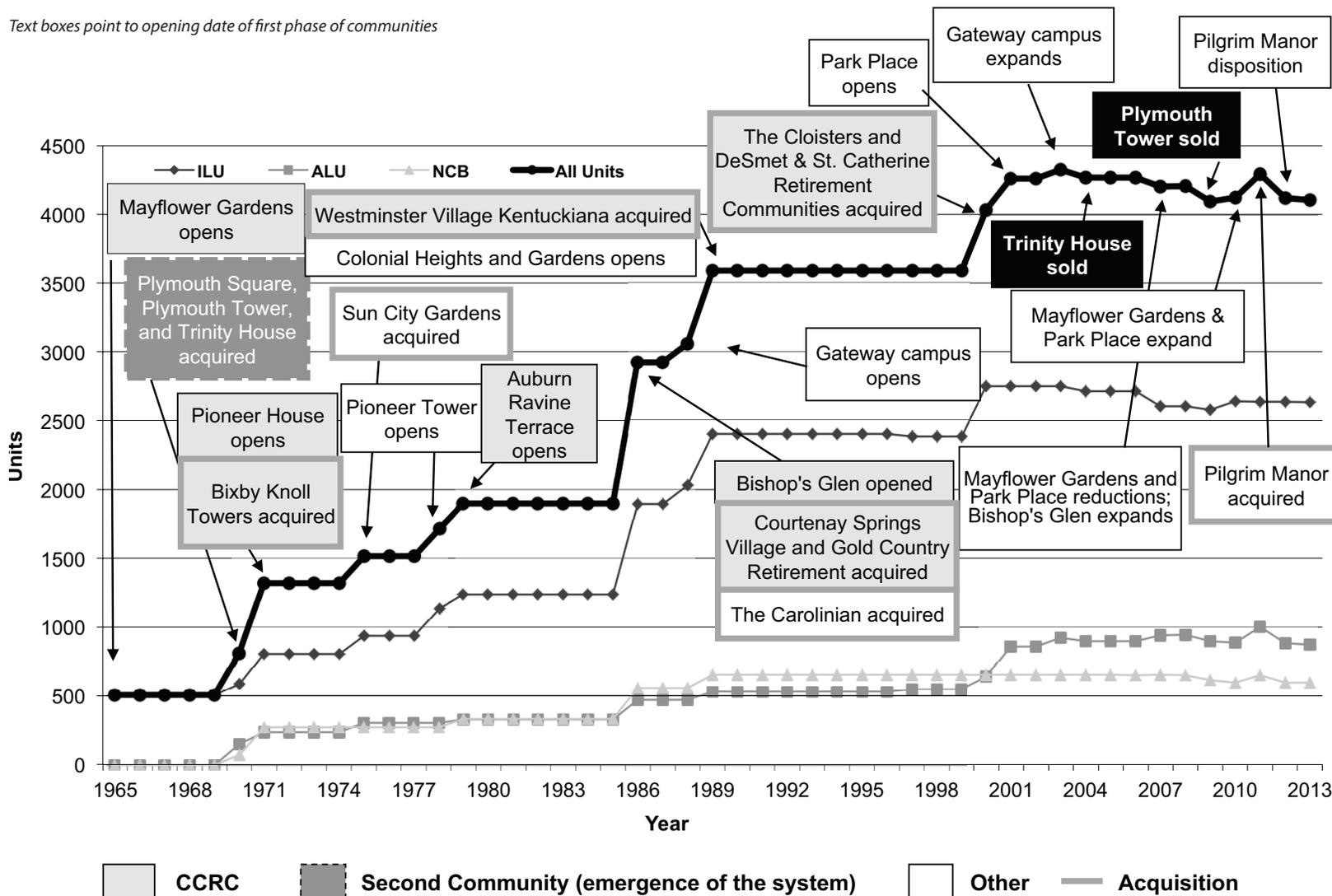


## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

#### 5-4e RETIREMENT HOUSING FOUNDATION (CA)

Text boxes point to opening date of first phase of communities

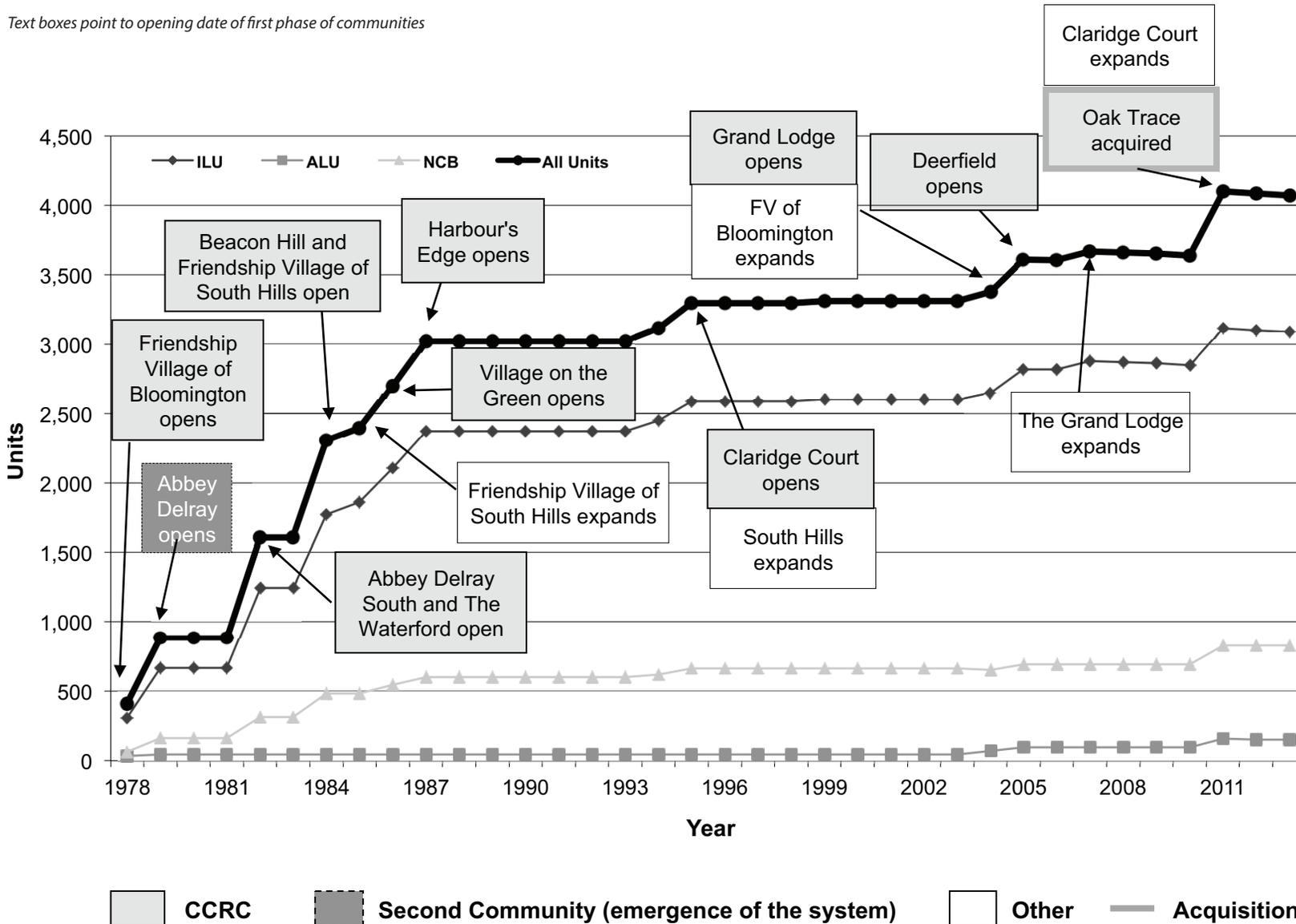


# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth

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

Text boxes point to opening date of first phase of communities



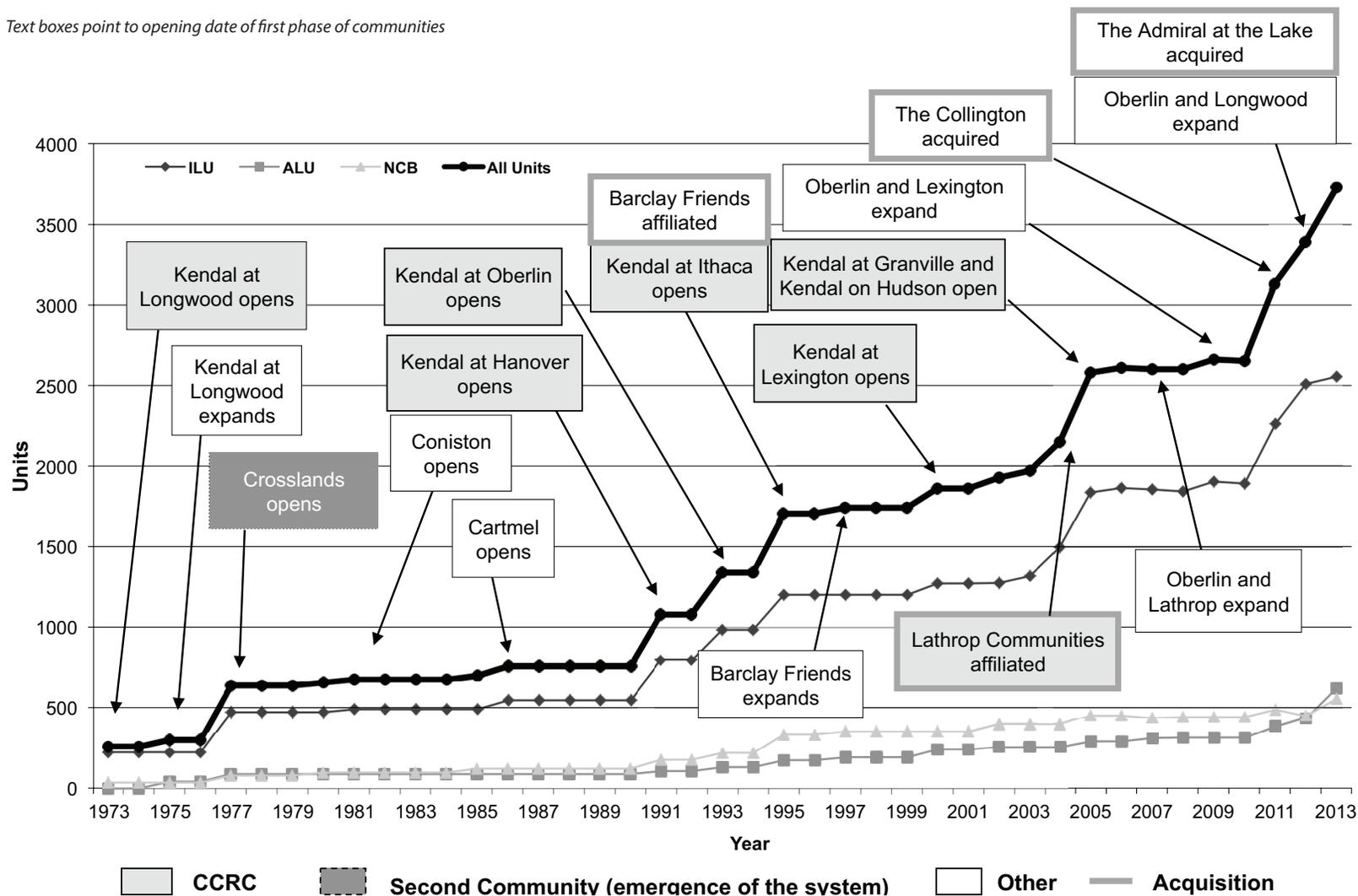
LeadingAge 150 Ziegler

## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

#### 5-4g THE KENDAL CORPORATION (PA)

Text boxes point to opening date of first phase of communities

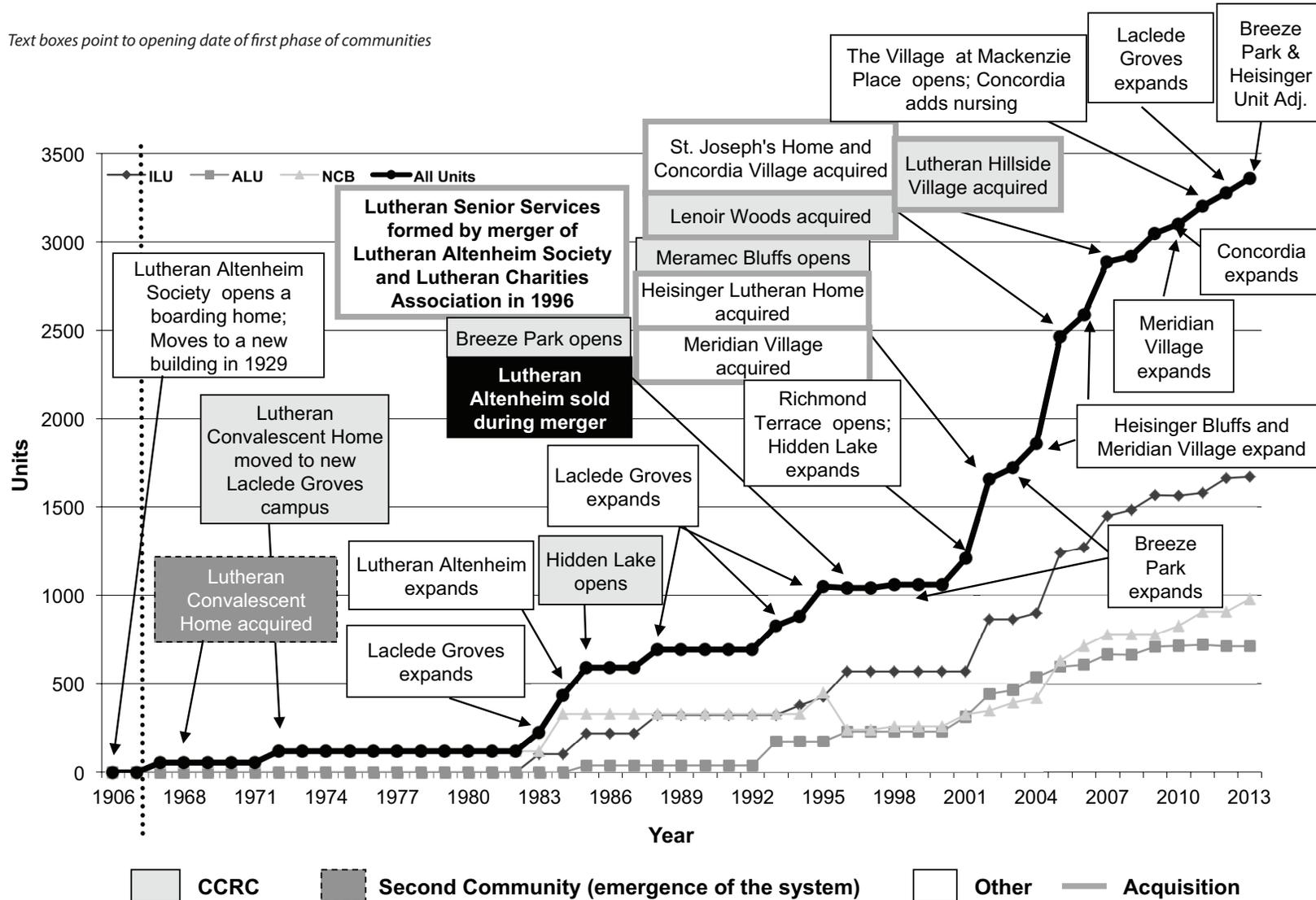


# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth

### 5-4h LUTHERAN SENIOR SERVICES (MO)

Text boxes point to opening date of first phase of communities



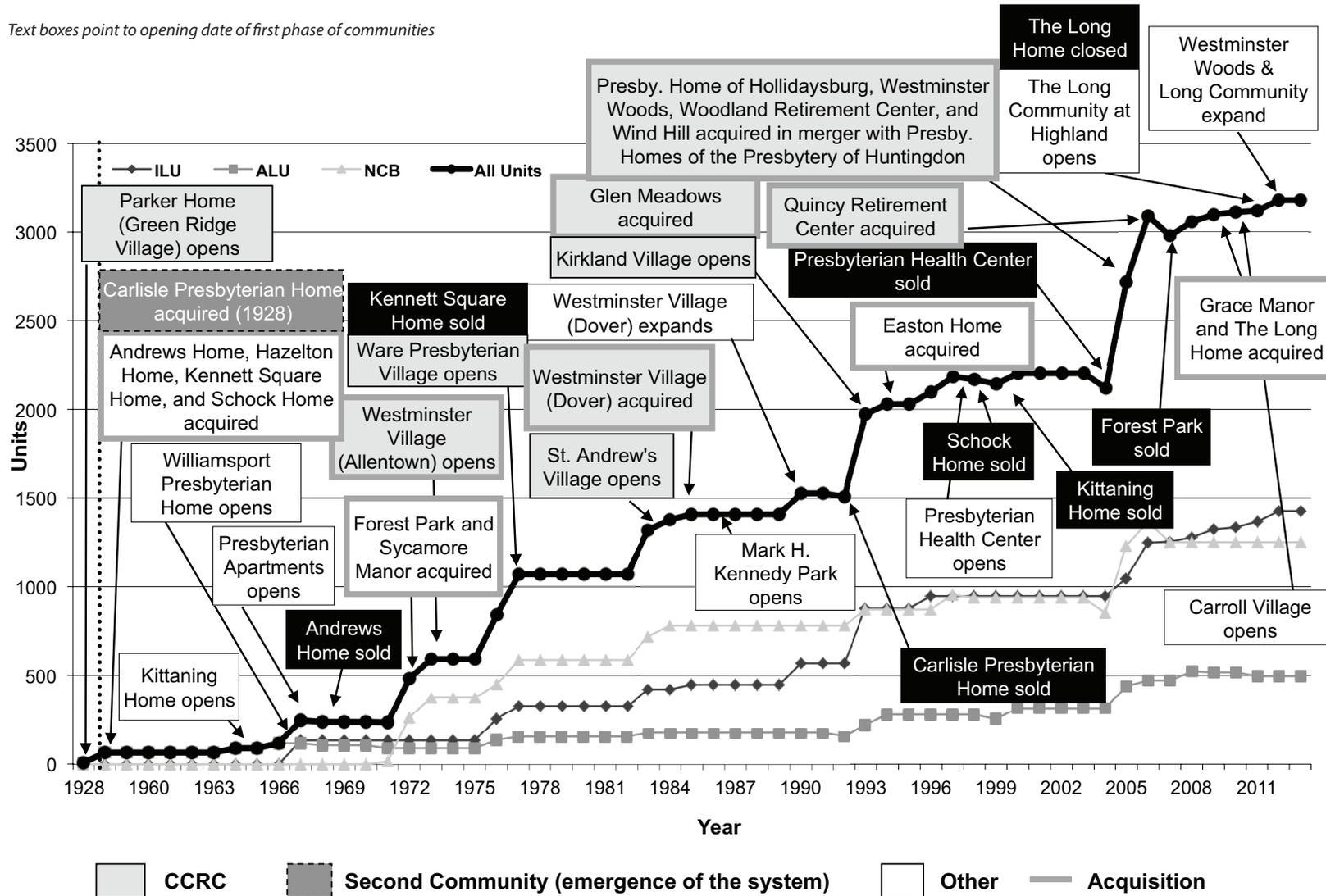


# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth

### 5-4j PRESBYTERIAN SENIOR LIVING (PA)

Text boxes point to opening date of first phase of communities

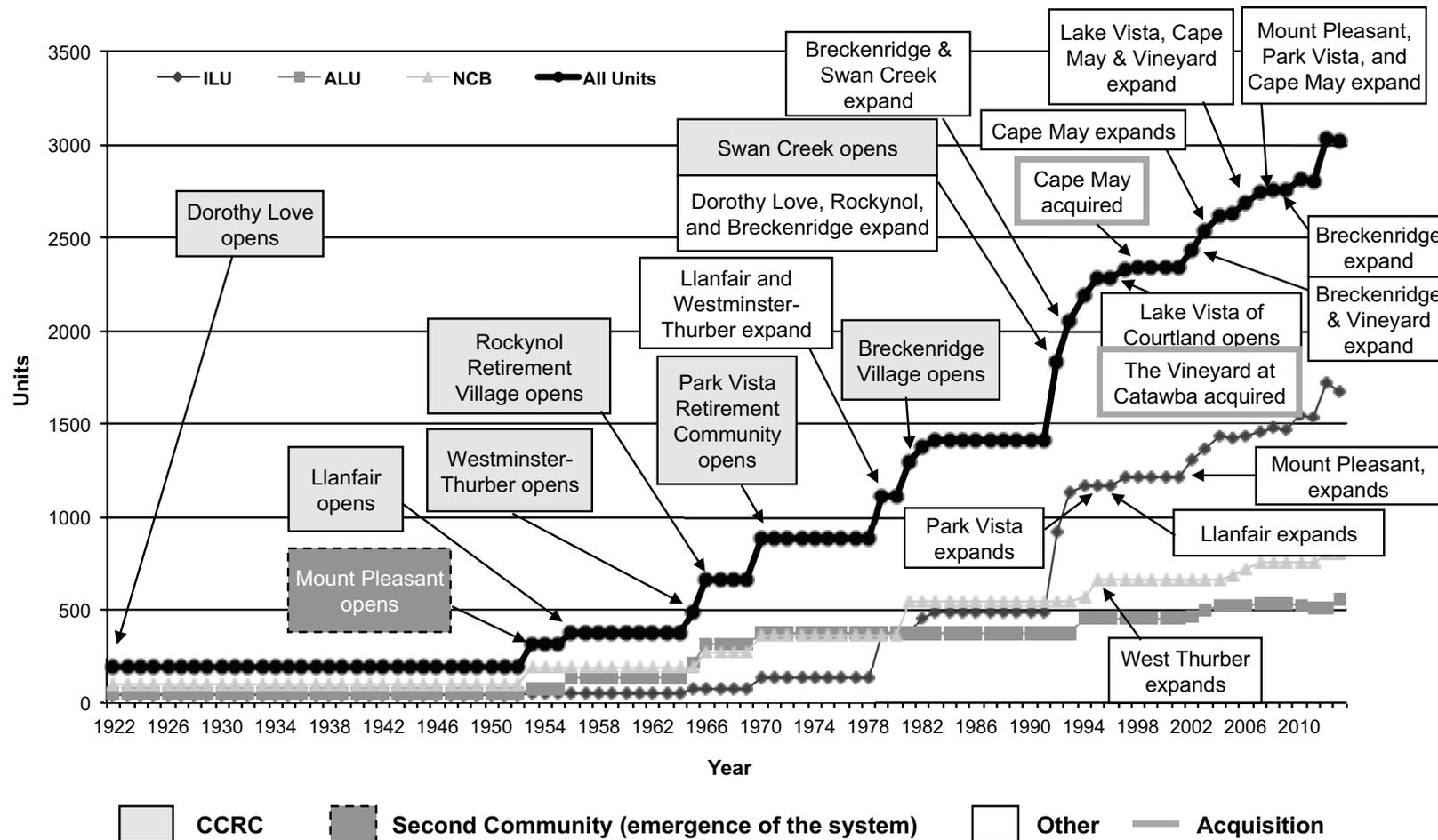


## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

#### 5-4k OHIO PRESBYTERIAN RETIREMENT SERVICES (OH)

Text boxes point to opening date of first phase of communities

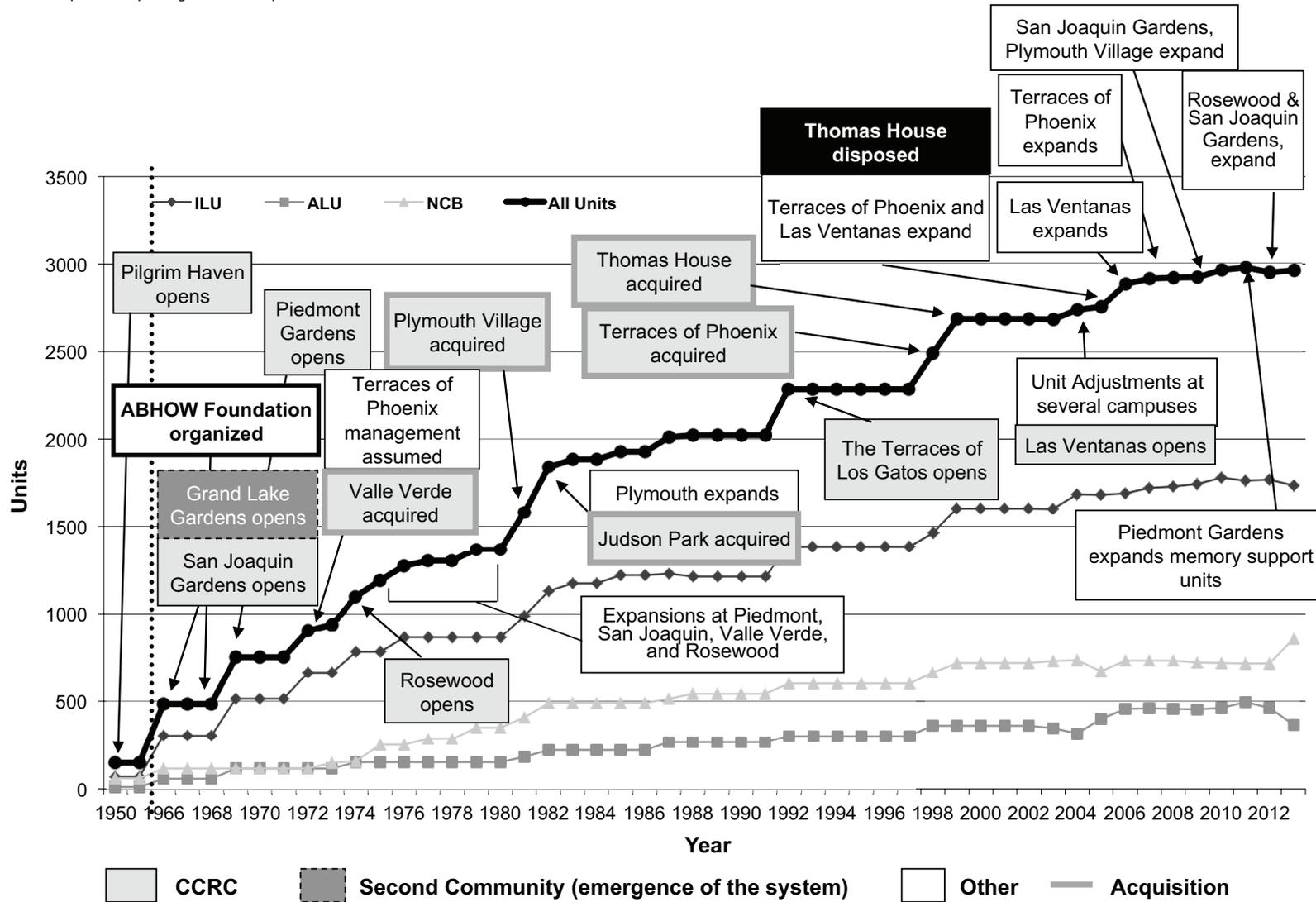


# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth

### 5-4I CORNERSTONE AFFILIATES (CA)

Text boxes point to opening date of first phase of communities

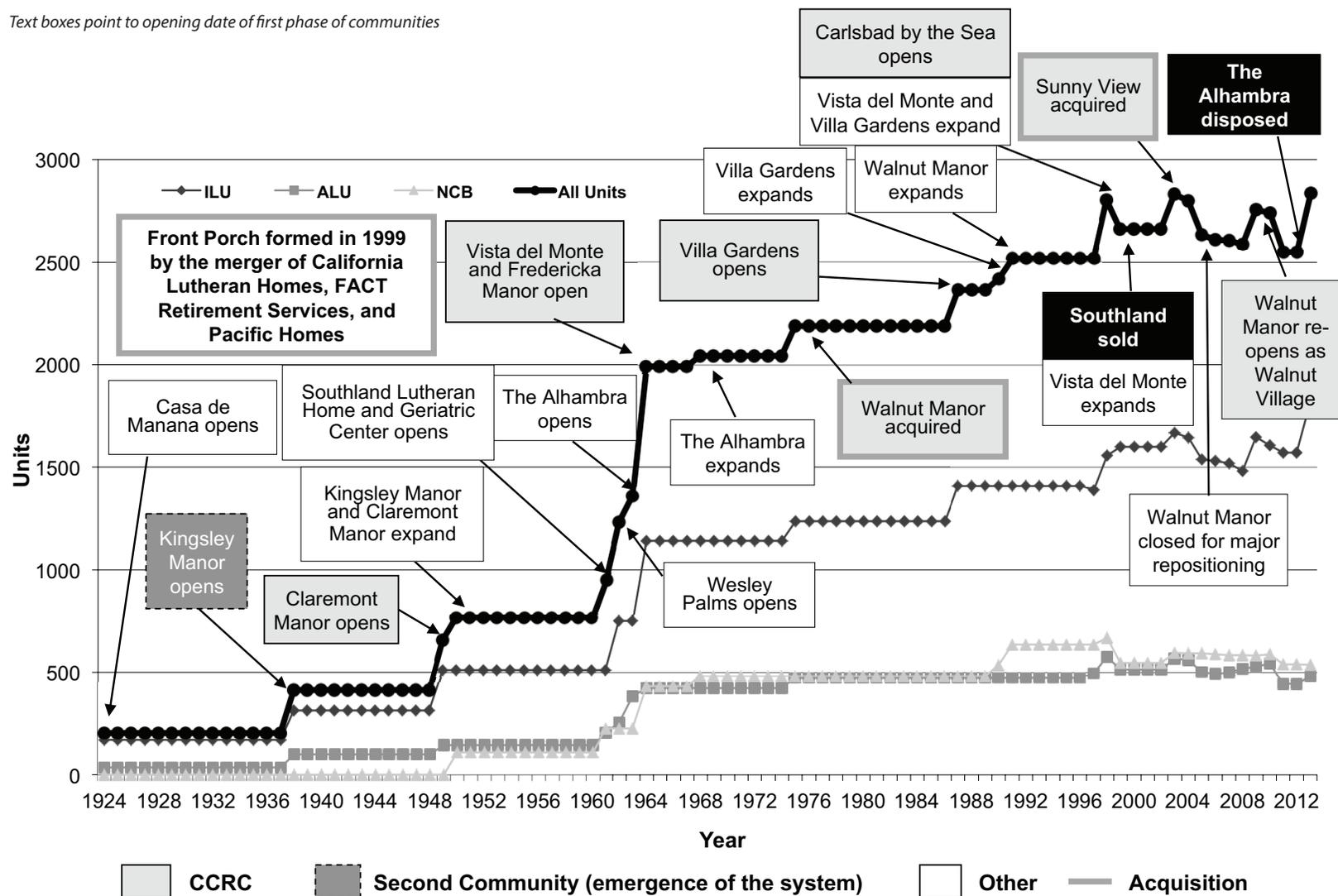


## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

#### 5-4m FRONT PORCH COMMUNITIES AND SERVICES (CA)

Text boxes point to opening date of first phase of communities

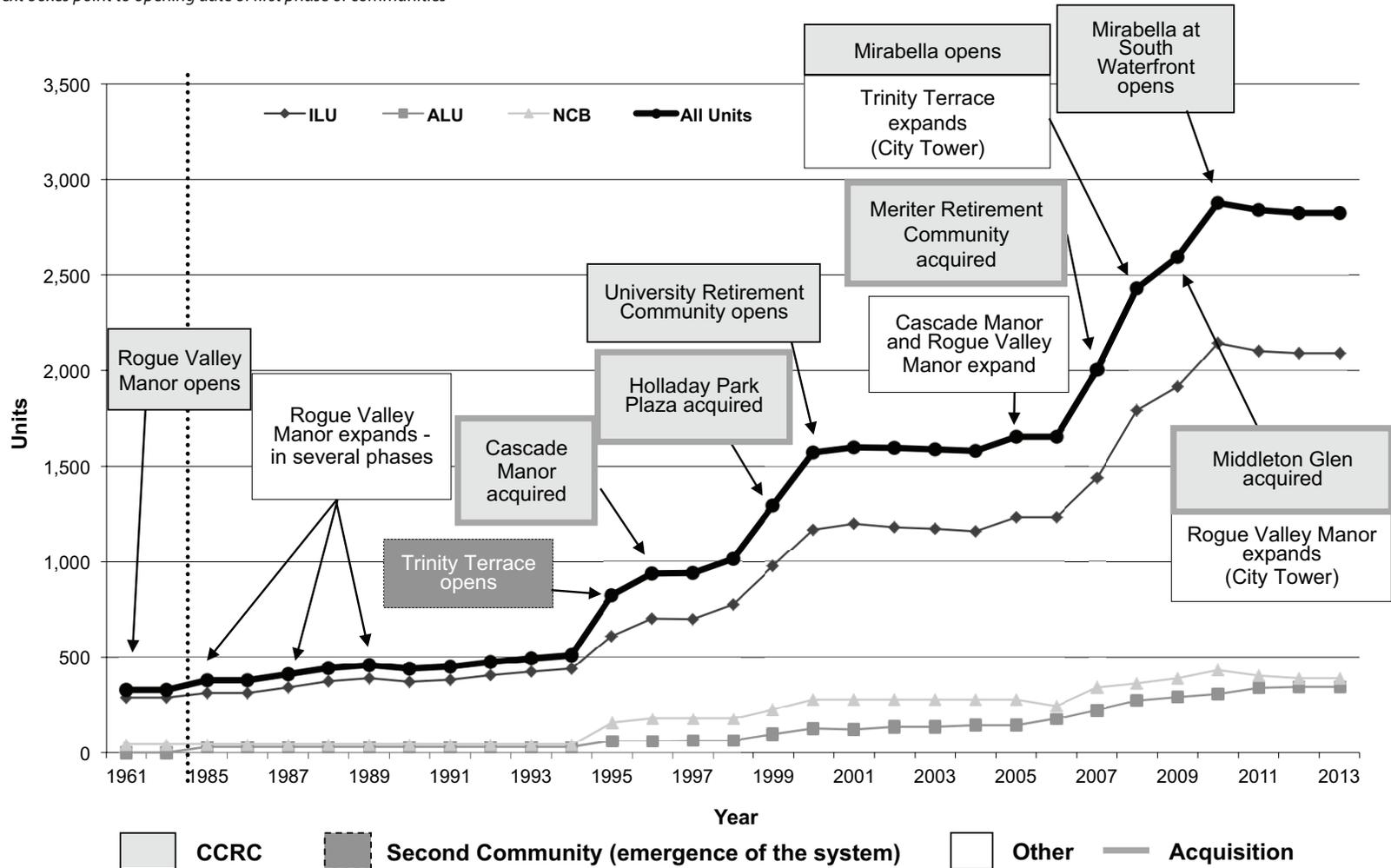


# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth

### 5-4n PACIFIC RETIREMENT SERVICES (OR)

Text boxes point to opening date of first phase of communities

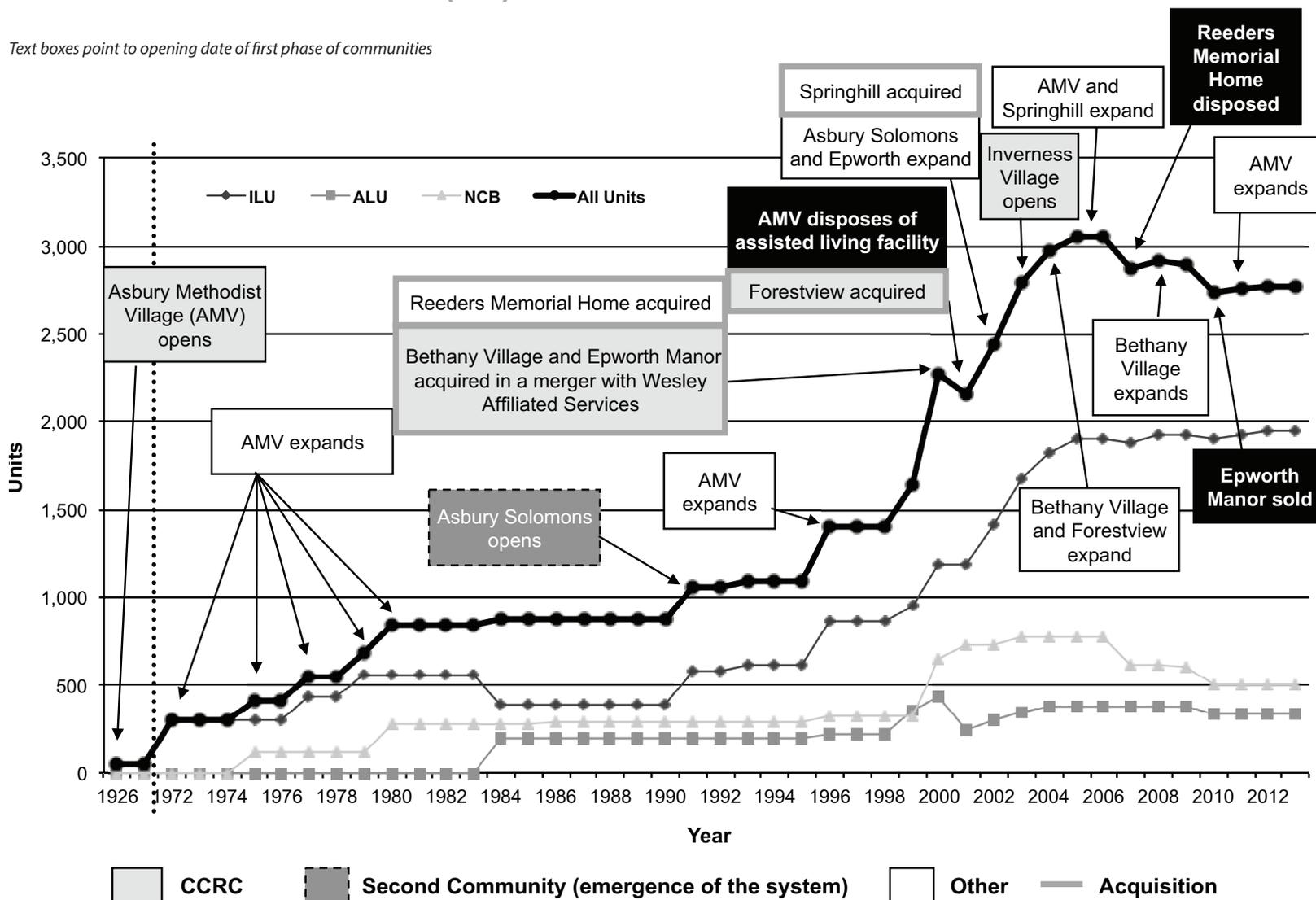


## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

#### 5-4o ASBURY COMMUNITIES (MD)

Text boxes point to opening date of first phase of communities

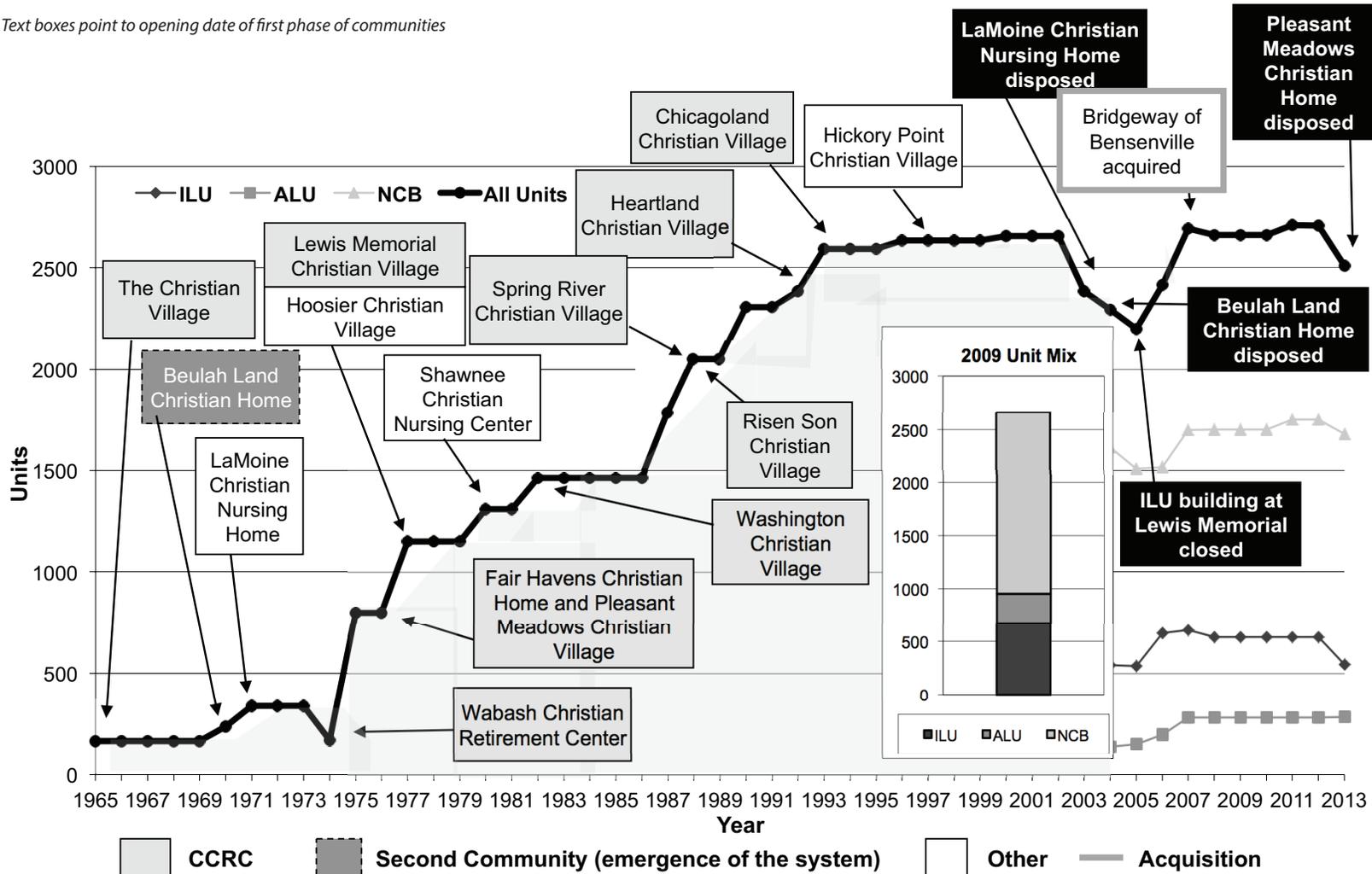


# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth

### 5-4p CHRISTIAN HOMES, INC (IL)

Text boxes point to opening date of first phase of communities



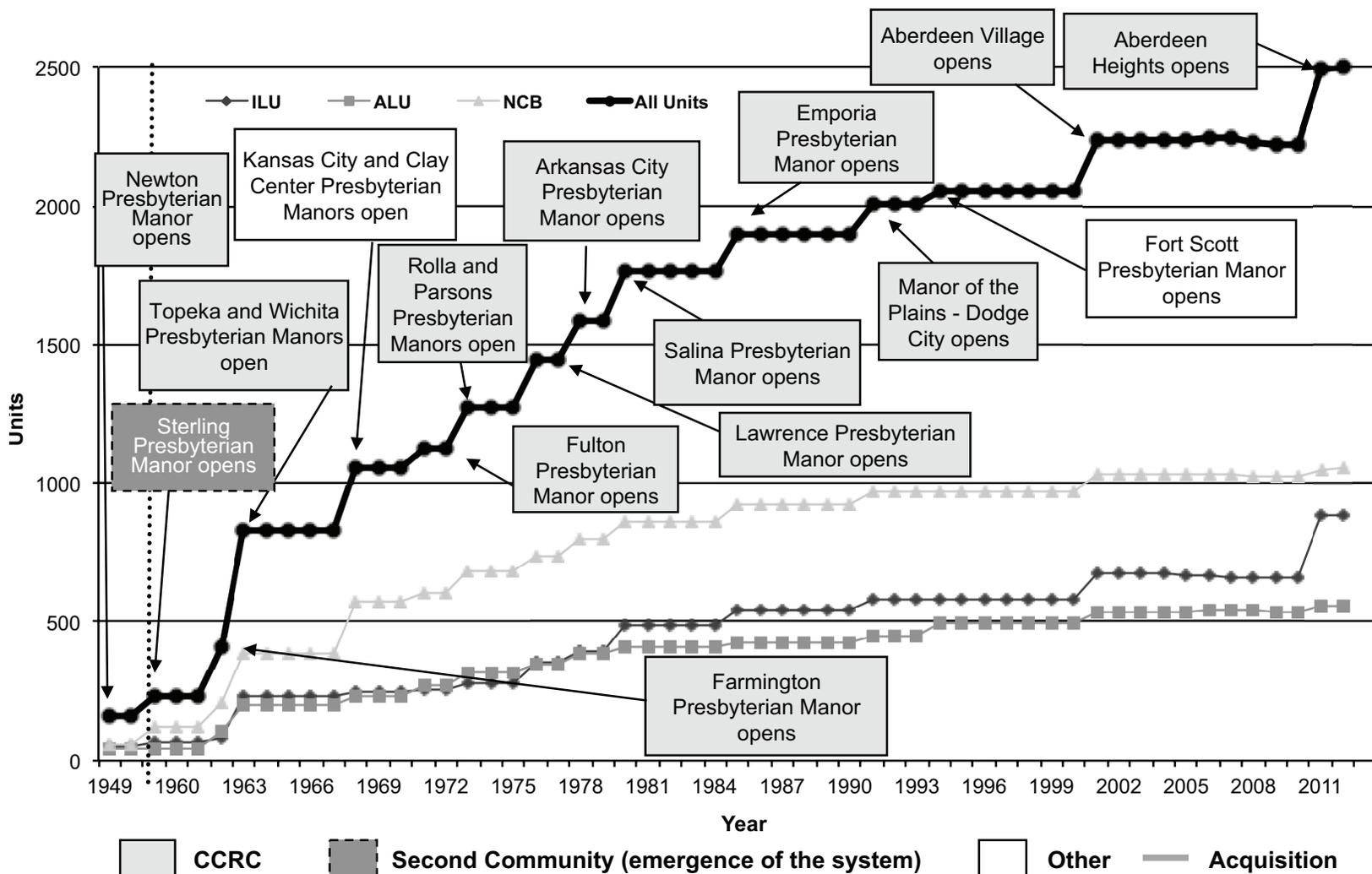
\* All text refers to opening dates. Unit mix shown as of 12/31/2003, due to lack of detail in early years.

## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

#### 5-4q PRESBYTERIAN MANORS OF MID-AMERICA (KS)

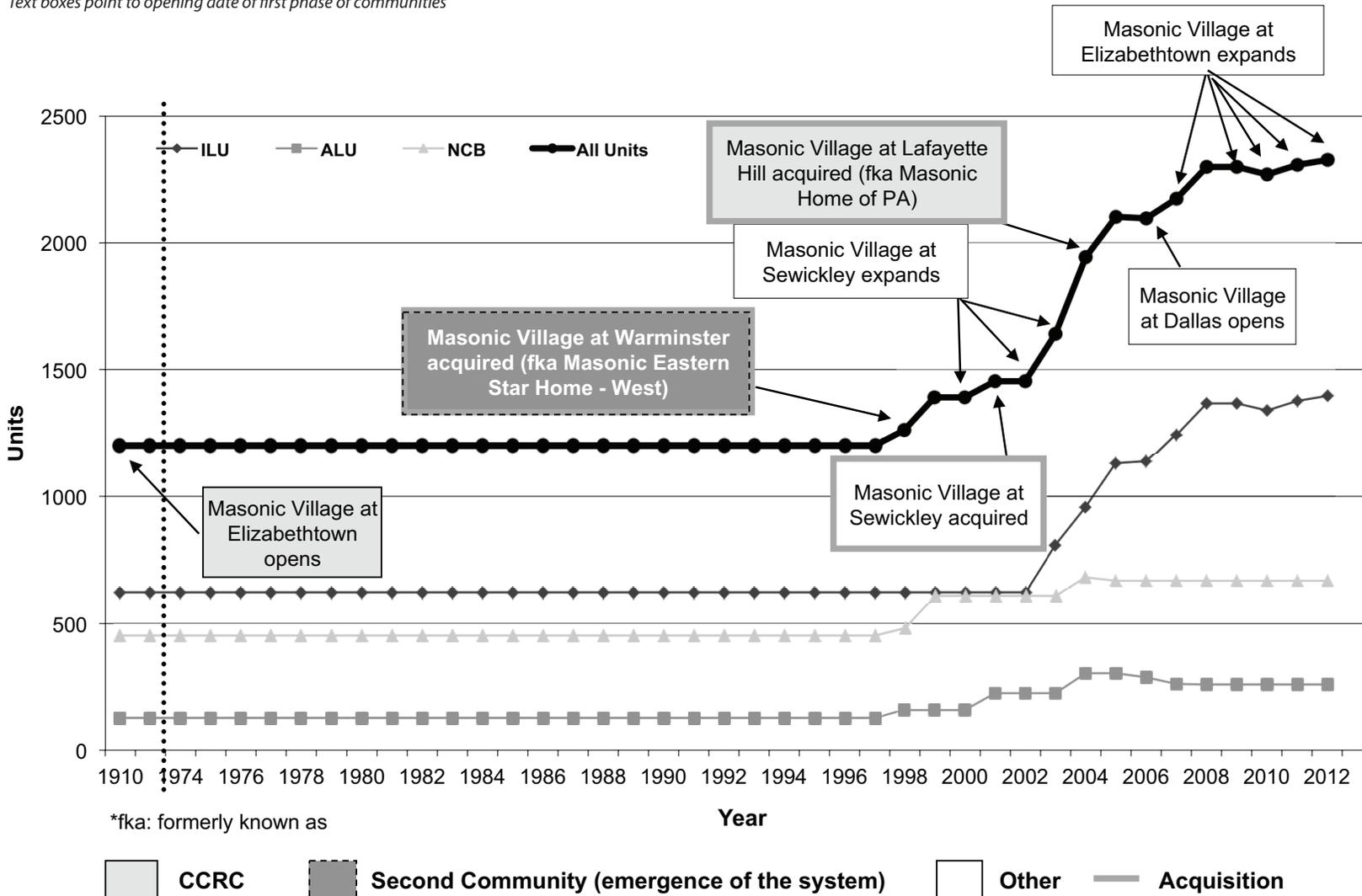
*Text boxes point to opening date of first phase of communities*



# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth 5-4r MASONIC VILLAGES (PA)

Text boxes point to opening date of first phase of communities

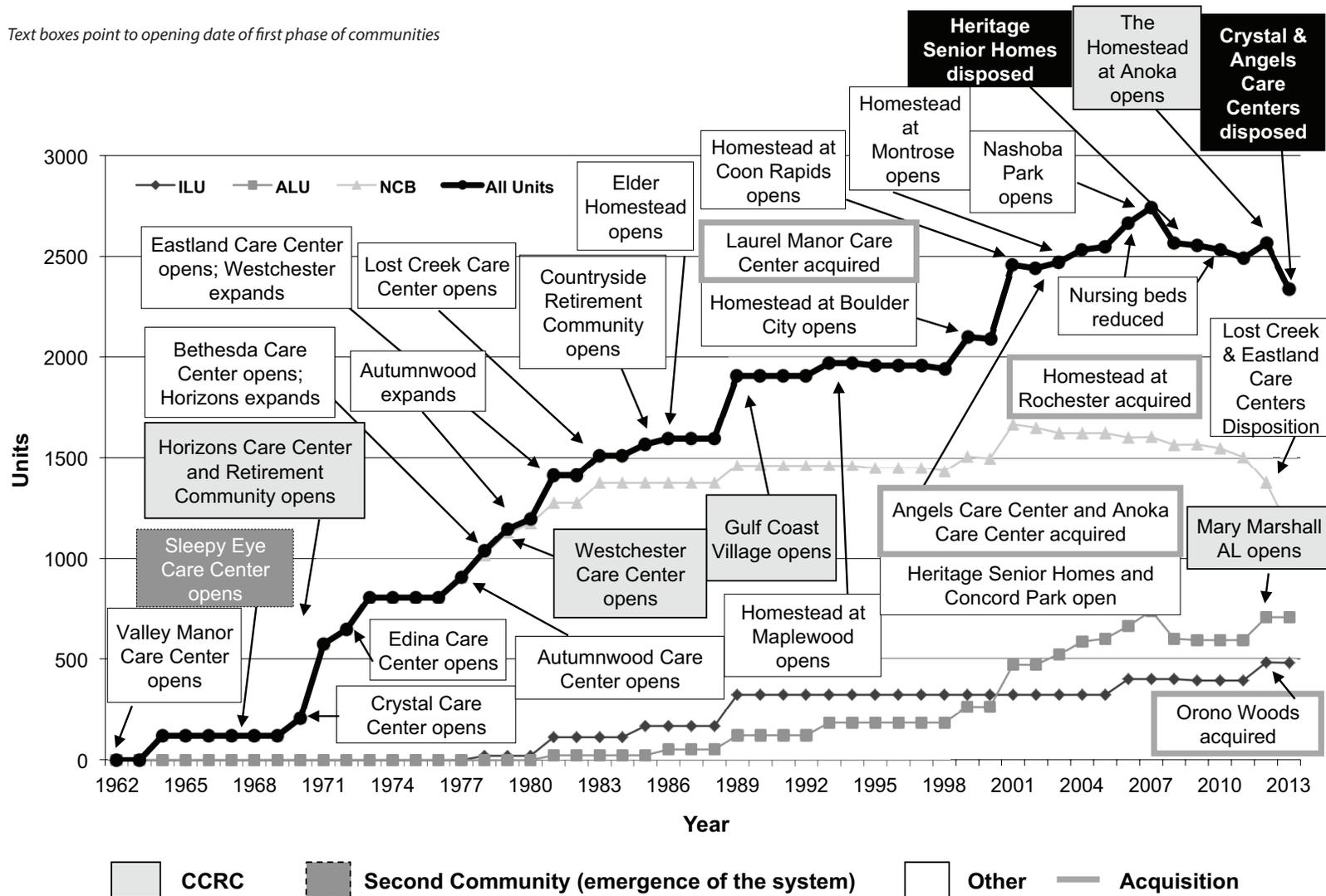


## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

#### 5-4s VOLUNTEERS OF AMERICA (VA)

Text boxes point to opening date of first phase of communities

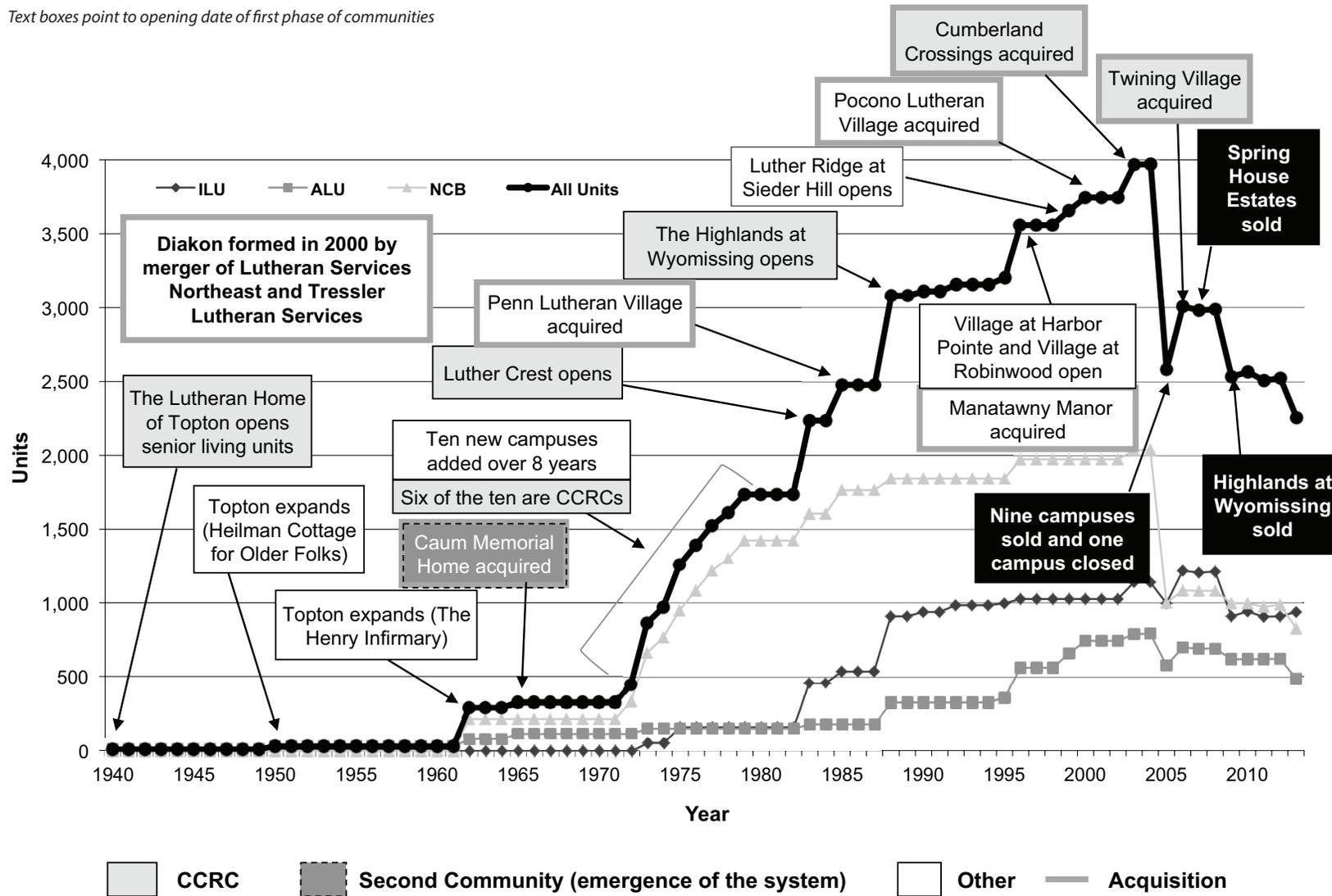


# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth

### 5-4t DIAKON LUTHERAN SOCIAL MINISTRIES (PA)

Text boxes point to opening date of first phase of communities

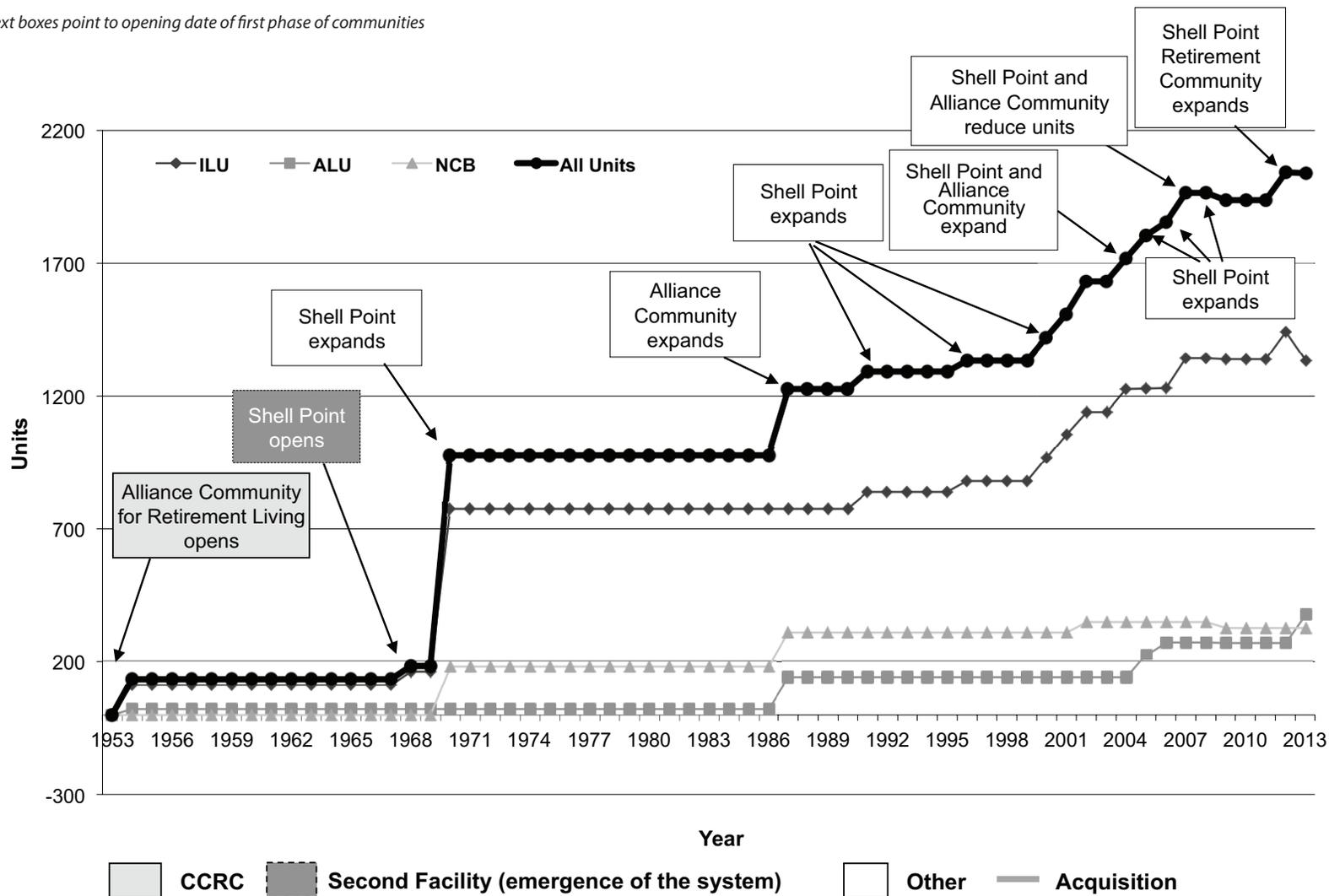


## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

#### 5-4u SHELL POINT RETIREMENT COMMUNITY (FL)

Text boxes point to opening date of first phase of communities

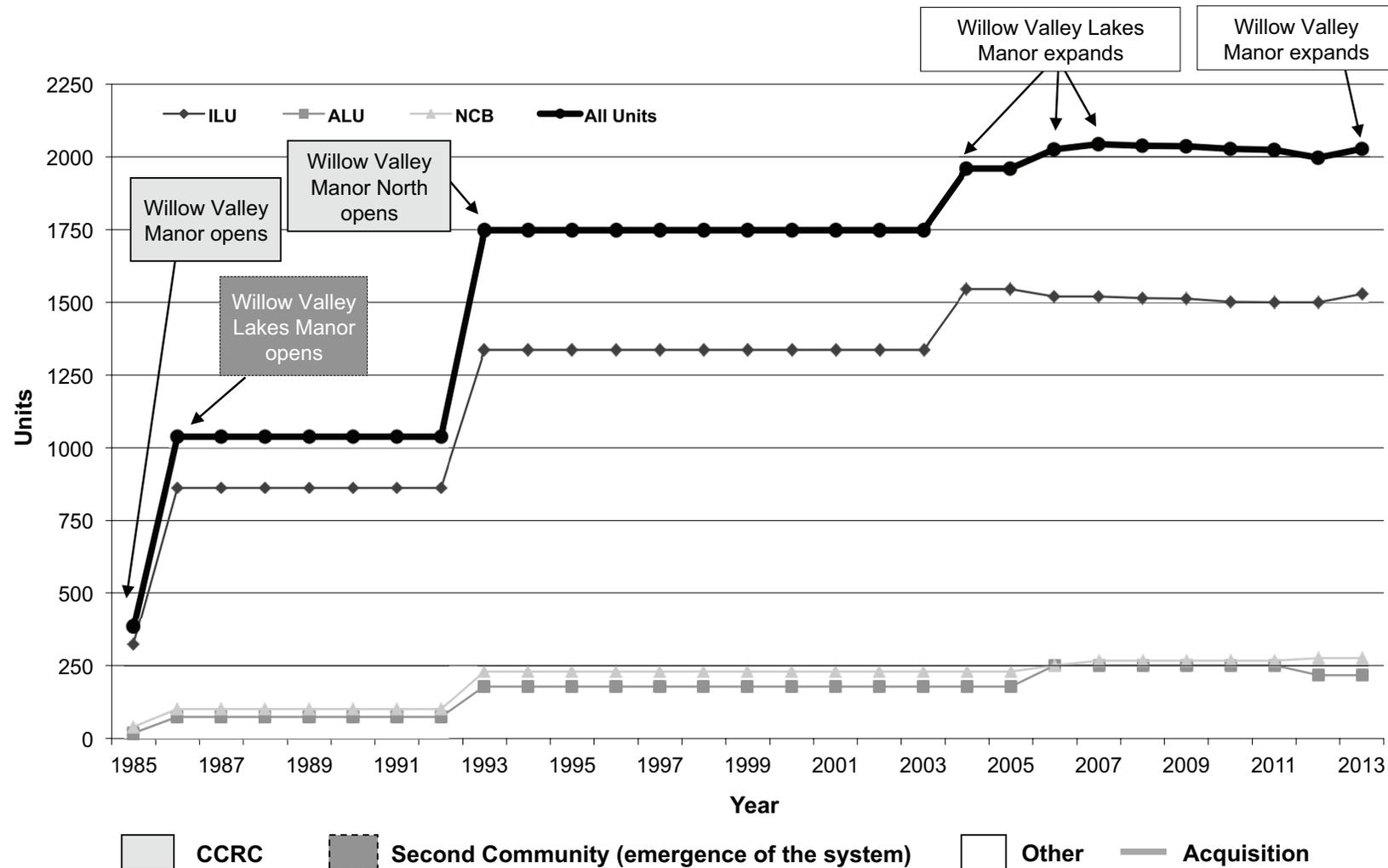


# 5-4 2014 LeadingAge Ziegler 150

## Growth: Pace of Growth

### 5-4v WILLOW VALLEY COMMUNITIES (PA)

Text boxes point to opening date of first phase of communities

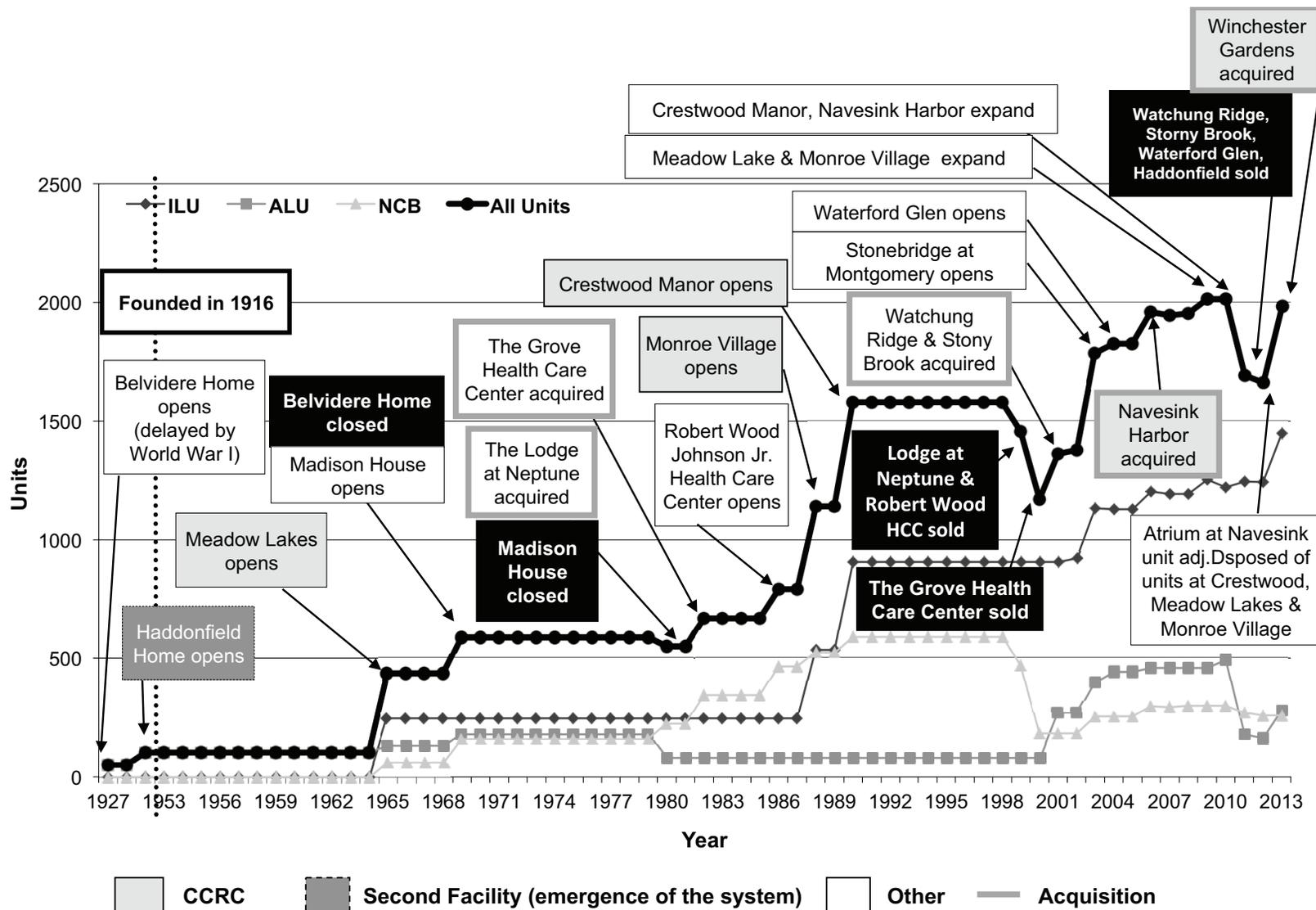


LeadingAge 150 Ziegler

## 5-4 2014 LeadingAge Ziegler 150

### Growth: Pace of Growth

5-4w SPRINGPOINT SENIOR LIVING, INC. (NJ)



## 5-5 2014 LeadingAge Ziegler 150

### Growth: Aggregate Growth

#### 5-5a ORGANIZATIONS BY AGGREGATE GROWTH, BY PERIOD

2014 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/13)
			Aggregate Growth (%)	Average Annual Growth (%)		
<i>Growth in 2013 (n=150)</i>						
85	Liberty Lutheran	PA	43.34%	43.34%	270	893
86	National Lutheran Communities & Services	MD	41.68%	41.68%	193	656
87	United Methodist Retirement Communities, Inc.	MI	37.90%	37.90%	155	564
96	Sunset Retirement Communities and Services	MI	29.86%	29.86%	189	822
58	SantaFe Senior Living	FL	25.82%	25.82%	252	1,228
52	Presbyterian Villages of Michigan	MI	25.29%	25.29%	266	1,318
25	Springpoint Senior Living	NJ	23.74%	23.74%	380	1,981
26	Lutheran Life Villages	IN	19.16%	19.16%	110	684
27	Heritage Ministries	NY	17.07%	17.07%	91	624
28	Landis Communities	PA	14.70%	14.70%	92	718
<i>Growth from 2000 to 2013 (n=150)</i>						
2	National Senior Campuses	MD	573.9%	17.2%	15,058	17,682
58	SantaFe Senior Living	FL	316.3%	12.6%	933	1,228
41	Loretto	NY	290.2%	12.0%	1,097	1,475
34	National Church Residences	OH	266.44%	11.43%	1,175	1,616
19	Ecumen	MN	258.16%	11.22%	1,709	2,371
9	Lutheran Senior Services	MO	216.89%	10.09%	2,299	3,359
29	Christian Care Companies	AZ	197.67%	9.52%	1,188	1,789
31	Concordia Lutheran Ministries	PA	166.26%	8.50%	1,079	1,728
79	United Church Homes & Services	NC	165.55%	8.48%	591	948
54	Lutheran Life Communities	IL	159.96%	8.29%	787	1,279
<i>Growth from 1990 to 2013 (n=145)</i>						
98	Givens Estates Retirement Community	NC	771.7%	10.3%	710	802
41	Loretto	NY	757.6%	10.3%	1,303	1,475
74	Elant	NY	729.2%	10.1%	875	995
75	Smith Senior Living	IL	720.0%	10.0%	540	615
71	Lutheran Homes of South Carolina	SC	667.9%	9.7%	895	1,029
83	Mather LifeWays	IL	533.80%	8.76%	758	900
15	Pacific Retirement Services, Inc.	OR	517.94%	8.63%	2,367	2,824
29	Christian Care Companies	AZ	450.46%	8.06%	1,464	1,789
58	SantaFe Senior Living	FL	433.91%	7.91%	998	1,228
67	Sears Methodist Retirement System, Inc.	TX	407.87%	7.67%	881	1,097

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

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

## 5-5 2014 LeadingAge Ziegler 150

### Growth: Aggregate Growth

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

2014 Rank	System Name	State	Growth*		Total Units (as of 12/31/13)
			Units Added	Aggregate Growth (%)	
<i>Growth in 2013 (n=150)</i>					
25	Springpoint Senior Living	NJ	380	23.74%	1,981
2	National Senior Campuses	MD	358	2.07%	17,682
8	The Kendal Corporation	PA	338	9.97%	3,727
14	Front Porch	CA	284	11.13%	2,835
85	Liberty Lutheran	PA	270	43.34%	893
52	Presbyterian Villages of Michigan	MI	266	25.29%	1,318
58	SantaFe Senior Living	FL	252	25.82%	1,228
4	Presbyterian Homes and Services	MN	200	3.04%	6,782
30	Senior Quality Lifestyles Corporation	TX	195	12.29%	1,782
31	National Lutheran Communities & Services	MD	193	41.68%	656
<i>Growth from 2000 to 2013 (n=150)</i>					
2	National Senior Campuses	MD	15,058	573.86%	17,682
1	Evangelical Lutheran Good Samaritan Society	SD	7,479	69.21%	18,286
4	Presbyterian Homes and Services	MN	4,101	152.97%	6,782
3	ACTS Retirement-Life Communities, Inc.	PA	2,302	40.04%	8,051
9	Lutheran Senior Services	MO	2,299	216.89%	3,359
8	The Kendal Corporation	PA	1,984	113.83%	3,727
30	Senior Quality Lifestyles Corporation	TX	1,782	n/a**	1,782
19	Ecumen	MN	1,709	258.2%	2,371
33	Homewood Retirement Centers	MD	1,646	n/a**	1,646
15	Pacific Retirement Services, Inc.	OR	1,527	117.73%	2,824
<i>Growth from 1990 to 2013 (n=145)</i>					
2	National Senior Campuses	MD	17,682	n/a**	17,682
1	Evangelical Lutheran Good Samaritan Society	SD	8,501	86.88%	18,286
4	Presbyterian Homes and Services	MN	6,782	732.15%	6,782
3	ACTS Retirement-Life Communities, Inc.	PA	3,120	63.27%	8,051
8	The Kendal Corporation	PA	2,974	394.95%	3,727
9	Lutheran Senior Services	MO	2,668	386.11%	3,359
15	Pacific Retirement Services, Inc.	OR	2,367	517.94%	2,824
10	Westminster Communities of Florida	FL	2,128	179.73%	3,312
16	Asbury Communities	MD	1,858	212.34%	2,733
30	Senior Quality Lifestyles Corporation	TX	1,782	n/a**	1,782

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

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

## 5-5 2014 LeadingAge Ziegler 150

### Growth: Aggregate Growth

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

2014 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/13)
			Aggregate Growth (%)	Average Annual Growth (%)		
<i>Growth in 2013 (n=150)</i>						
14	Front Porch	CA	11.13%	11.13%	284	2,835
8	The Kendal Corporation	PA	9.97%	9.97%	338	3,727
4	Presbyterian Homes and Services	MN	3.04%	3.04%	200	6,782
9	Lutheran Senior Services	MO	2.50%	2.50%	82	3,359
2	National Senior Campuses	MD	2.07%	2.07%	358	17,682
5	Covenant Retirement Communities	IL	1.97%	1.97%	91	4,703
24	Willow Valley Retirement Communities	PA	1.45%	1.45%	29	2,026
20	Masonic Villages	PA	0.95%	0.95%	22	2,347
10	Westminster Communities of Florida	FL	0.39%	0.39%	13	3,312
<i>Growth from 2000 to 2013 (n=150)</i>						
2	National Senior Campuses	MD	573.86%	17.23%	15,058	17,682
19	Ecumen	MN	258.16%	11.22%	1,709	2,371
9	Lutheran Senior Services	MO	216.89%	10.09%	2,299	3,359
4	Presbyterian Homes and Services	MN	152.97%	8.04%	4,101	6,782
15	Pacific Retirement Services, Inc.	OR	117.73%	6.70%	1,527	2,824
8	The Kendal Corporation	PA	113.83%	6.54%	1,984	3,727
1	Evangelical Lutheran Good Samaritan Society	SD	69.21%	4.48%	7,479	18,286
20	Masonic Villages	PA	68.73%	4.46%	956	2,347
16	Asbury Communities	MD	66.85%	4.36%	1,095	2,733
10	Westminster Communities of Florida	FL	55.71%	3.76%	1,185	3,312
<i>Growth from 1990 to 2013 (n=145)</i>						
4	Presbyterian Homes and Services	MN	732.1%	10.1%	4,101	6,782
15	Pacific Retirement Services, Inc.	OR	517.94%	8.63%	1,527	2,824
8	The Kendal Corporation	PA	394.95%	7.54%	1,984	3,727
9	Lutheran Senior Services	MO	386.11%	7.45%	2,299	3,359
19	Ecumen	MN	258.16%	5.97%	1,709	2,371
16	Asbury Communities	MD	212.34%	5.31%	1,095	2,733
10	Westminster Communities of Florida	FL	179.73%	4.79%	1,185	3,312
11	Presbyterian Senior Living	PA	125.57%	3.77%	1,035	3,176
12	Ohio Presbyterian Retirement Services	OH	114.94%	3.54%	681	3,022
20	Masonic Villages	PA	95.42%	3.09%	956	2,347

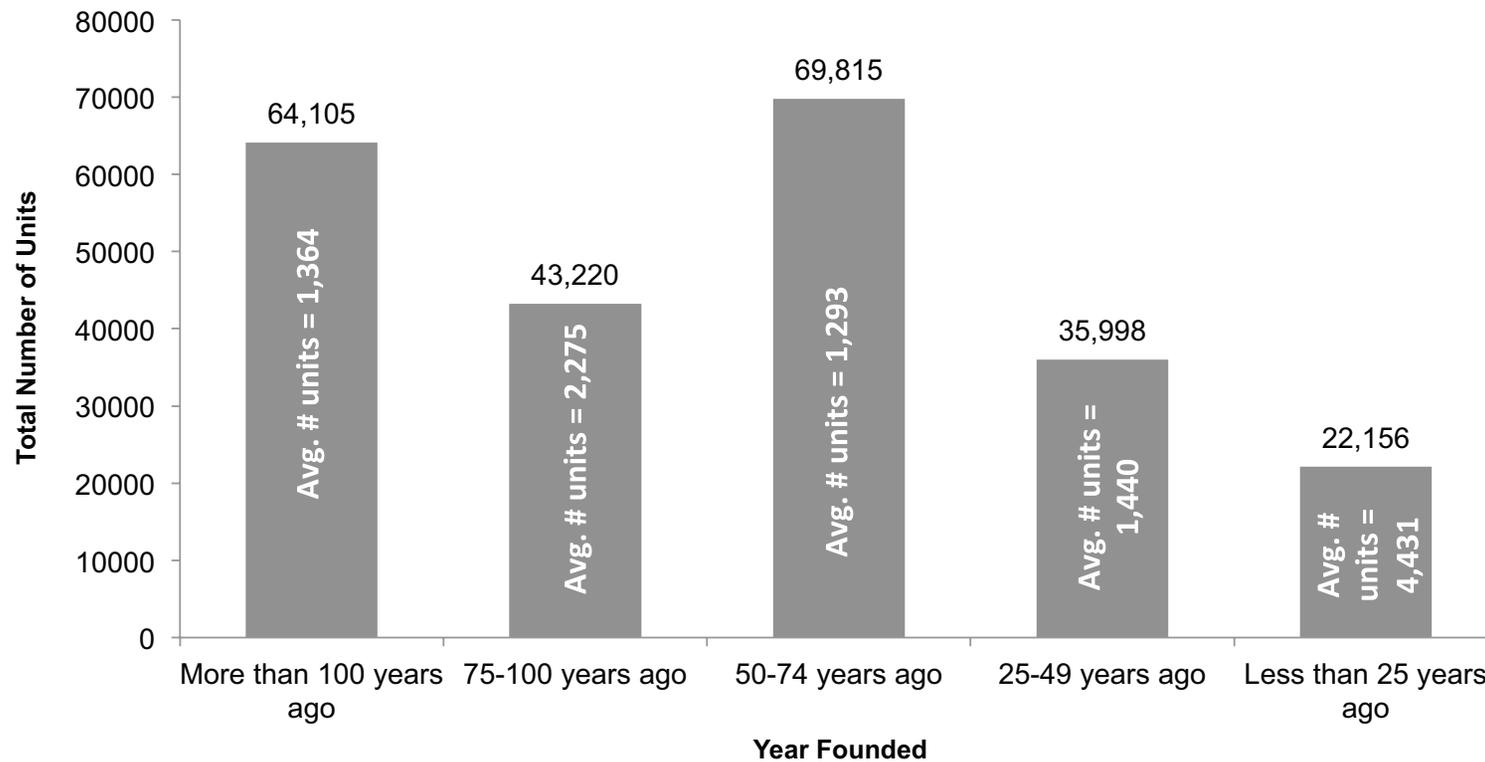
\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization. Average Annual Growth was calculated by finding the geometric mean over the period (1, 13, or 23 years).

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

## 5-6 2014 LeadingAge Ziegler 150

### Growth: Size By Year Founded

#### 5-6 TOTAL UNITS BY YEAR FOUNDED AMONG LZ 150

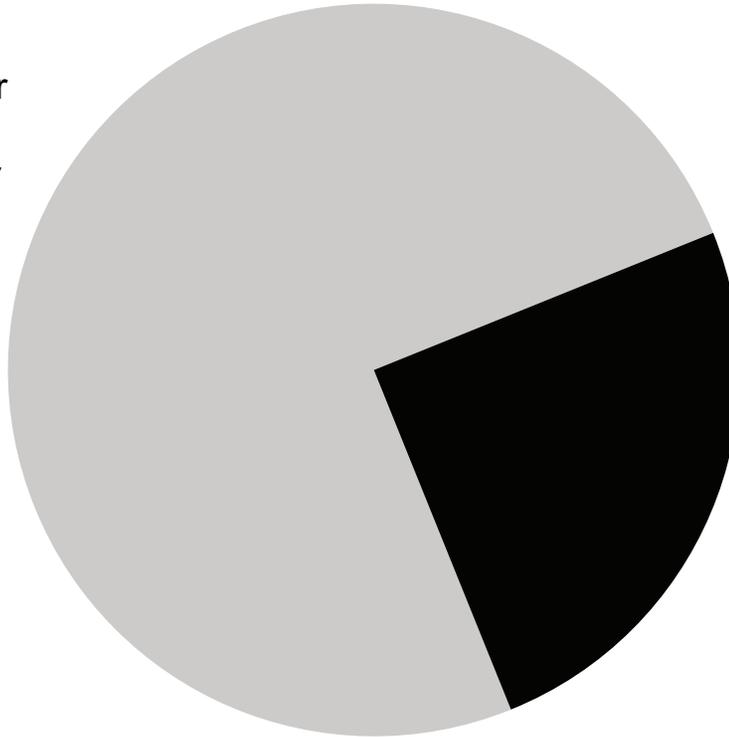


## 5-7 2014 LeadingAge Ziegler 150

### Growth: Future Growth Plans

5-7a PERCENTAGE OF LZ 150 PLANNING TO EXPAND OR REPOSITION IN NEXT TWO YEARS

Yes, plan to expand or reposition an existing community in 2014 or 2015  
75%



Not planning to expand or reposition in 2014 or 2015  
25%

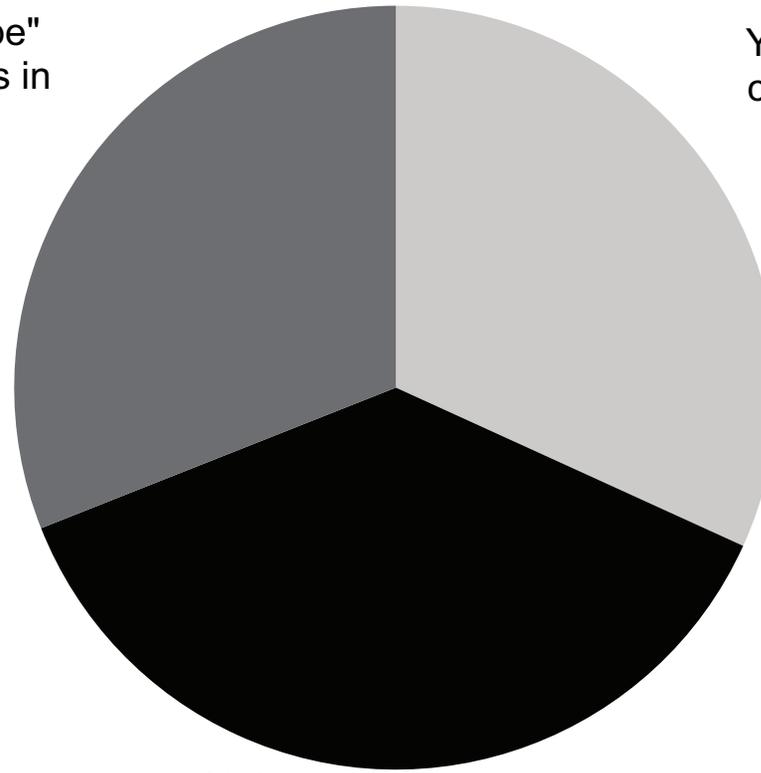
## 5-7 2014 LeadingAge Ziegler 150

### Growth: Future Growth Plans

#### 5-7b PERCENTAGE OF LZ 150 PLANNING TO GROW THROUGH DEVELOPMENT OR AFFILIATION

Responding "maybe"  
to new communities in  
2014 or 2015  
31%

Yes, plan to add new  
communities in 2014  
or 2015  
32%

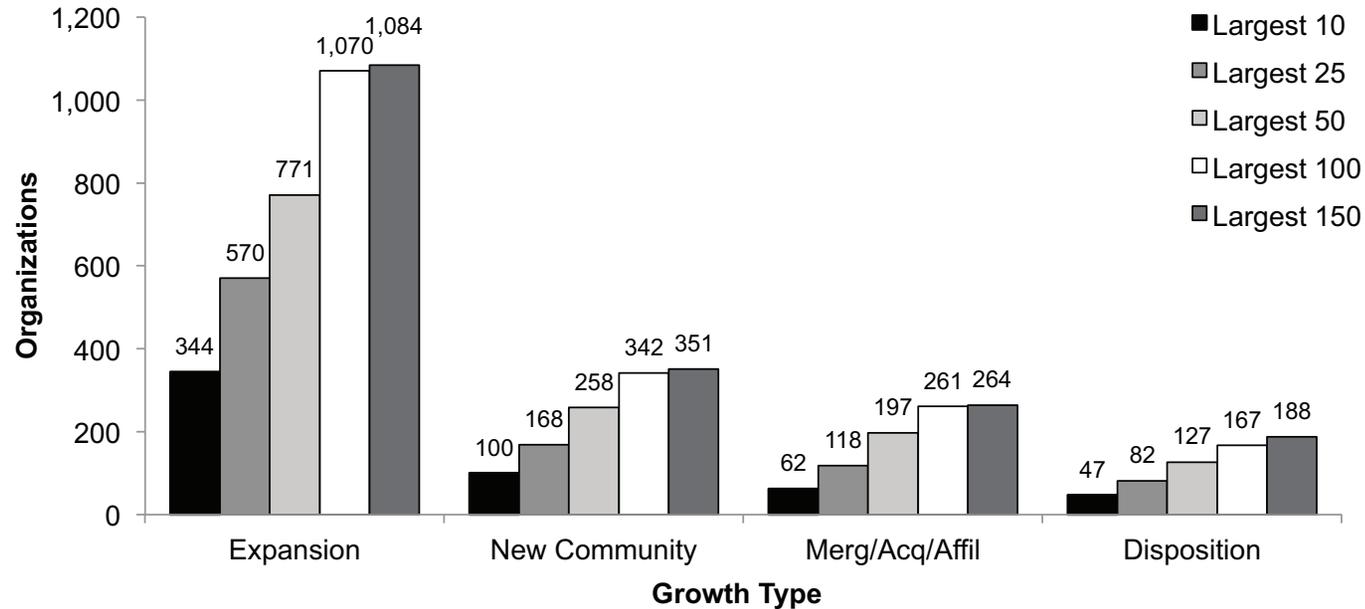


Not planning to add  
new communities in  
2014 or 2015  
37%

## 5-8 2014 LeadingAge Ziegler 150

### Growth: Type of Growth by Organizations

5-8a NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1980 THROUGH 2013



**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.

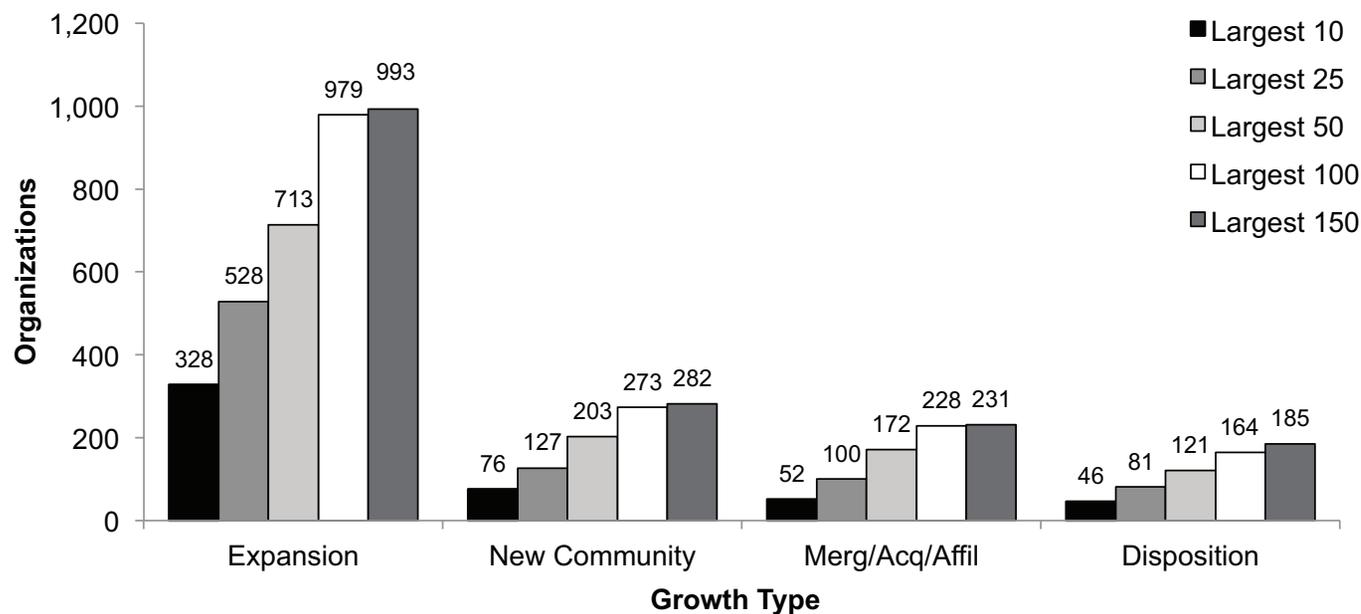
**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

## 5-8 2014 LeadingAge Ziegler 150

### Growth: Type of Growth by Organizations

5-8b NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1990 THROUGH 2013



**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.

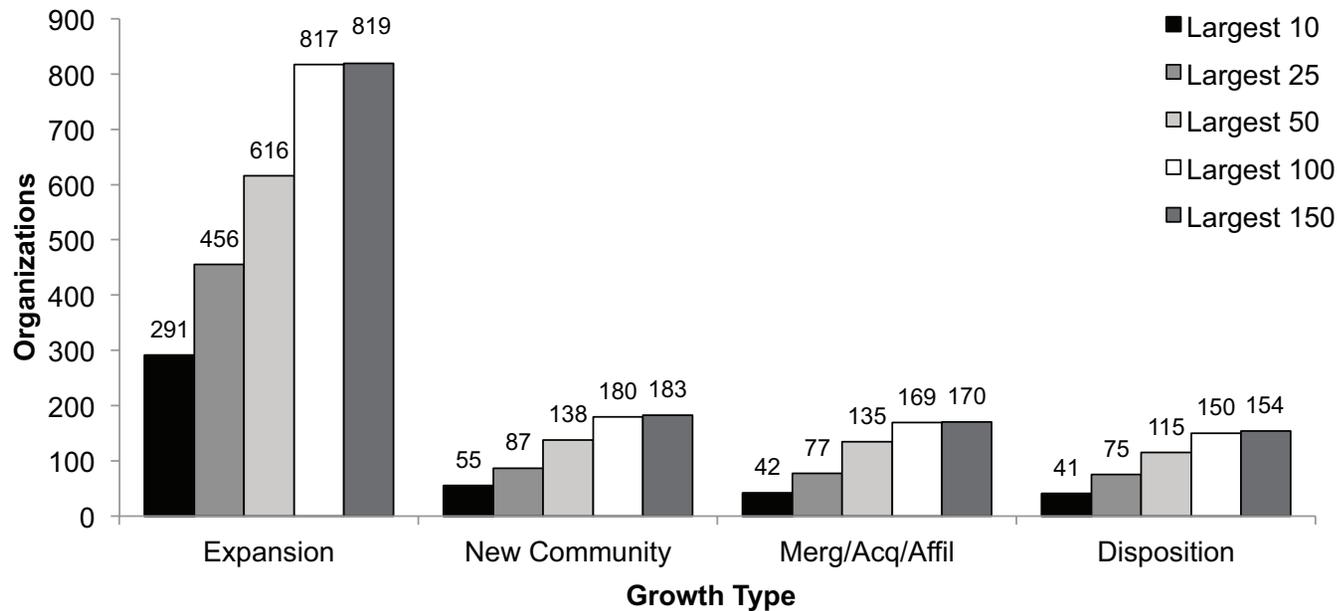
**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

## 5-8 2014 LeadingAge Ziegler 150

### Growth: Type of Growth by Organizations

5-8c NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 2000 THROUGH 2013



**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.

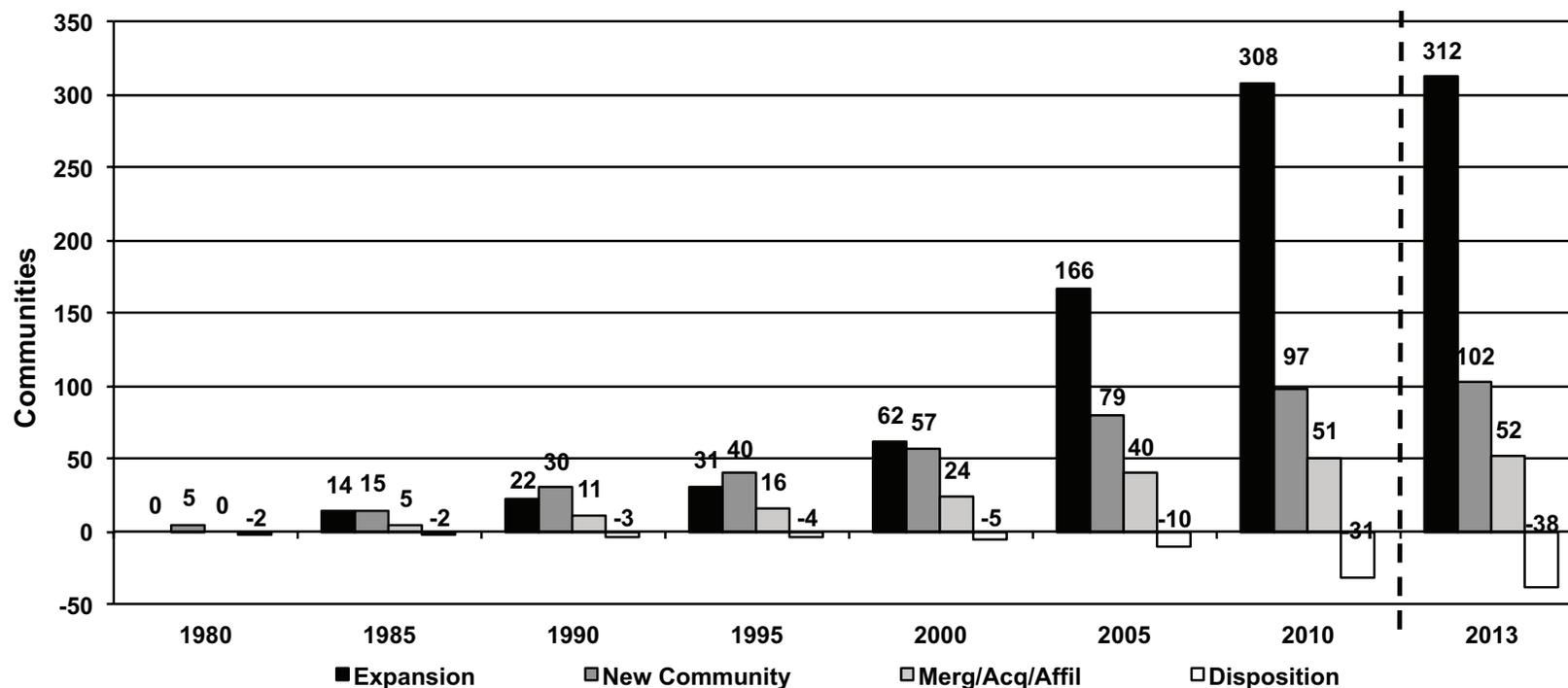
**Disposition:** The sale or closure of a community.

## 5-9 2014 LeadingAge Ziegler 150

### 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.

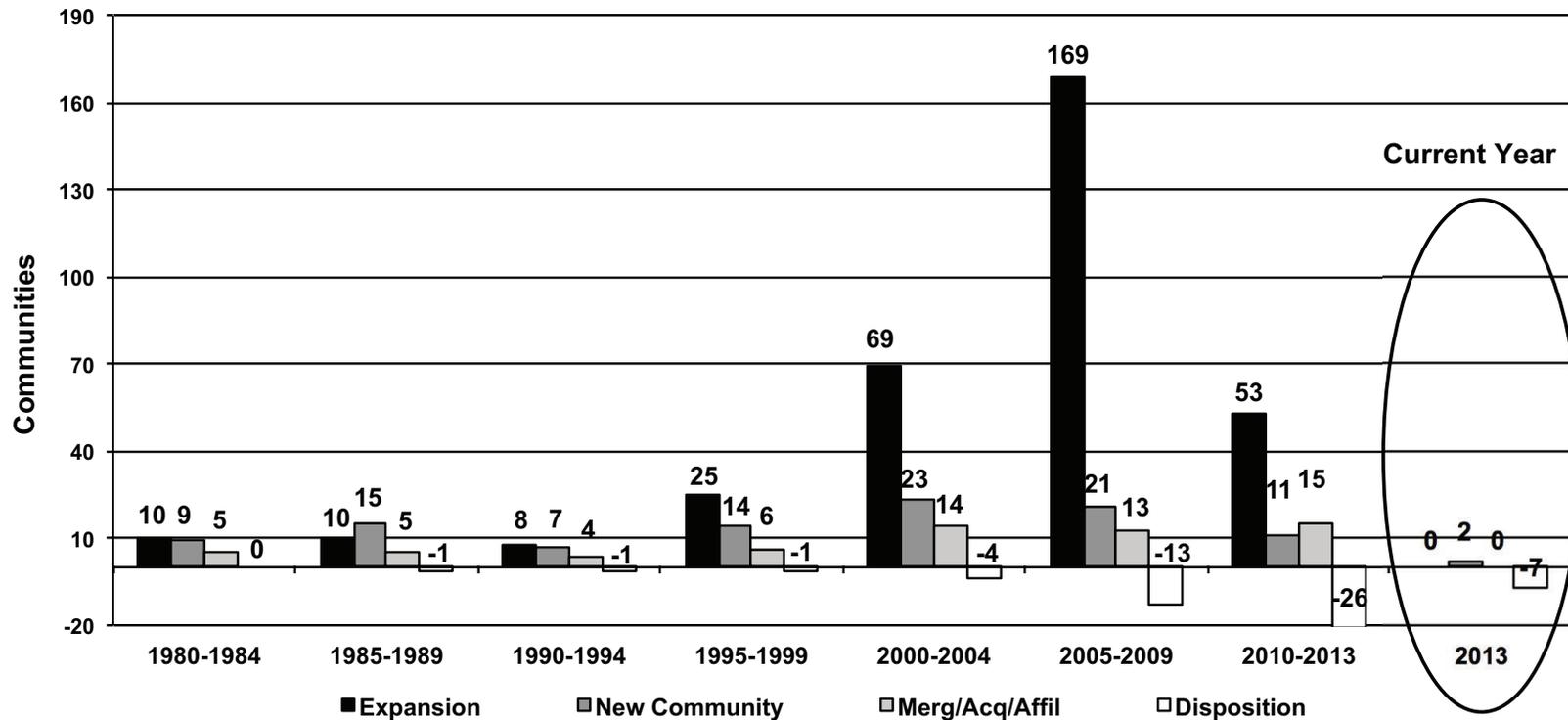
**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

# 5-9 2014 LeadingAge Ziegler 150

## 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.

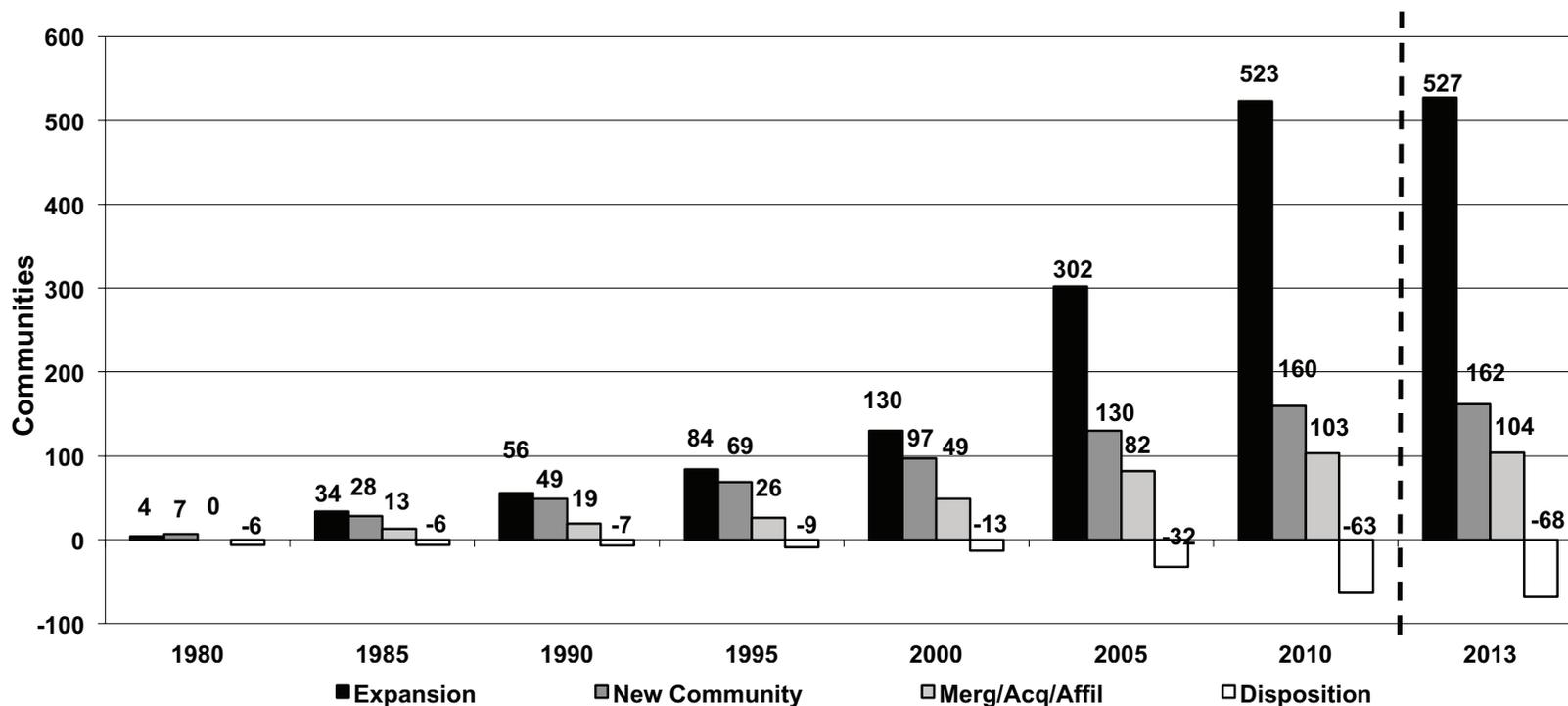
**Disposition:** The sale or closure of a community.

## 5-9 2014 LeadingAge Ziegler 150

### 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.

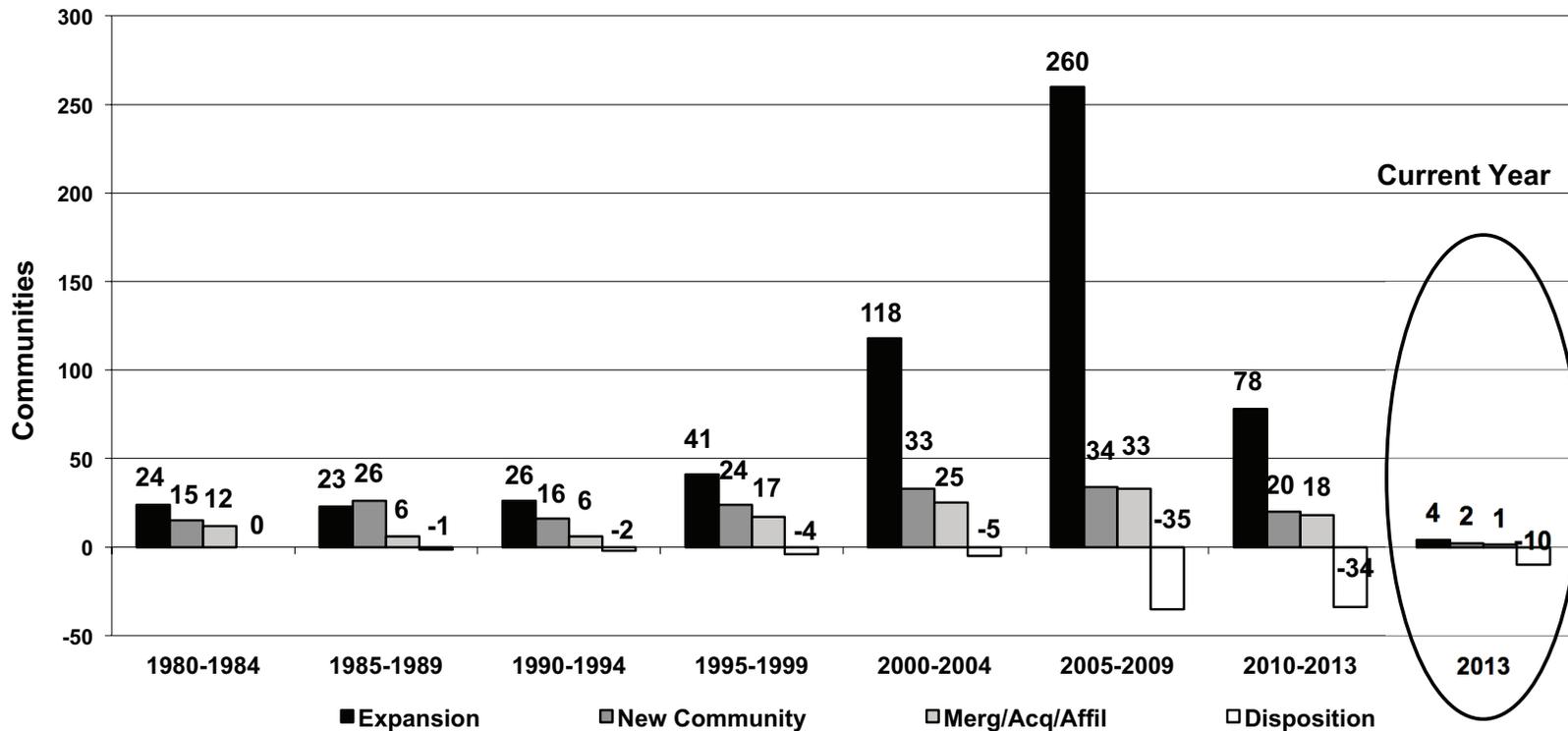
**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

# 5-9 2014 LeadingAge Ziegler 150

## 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.

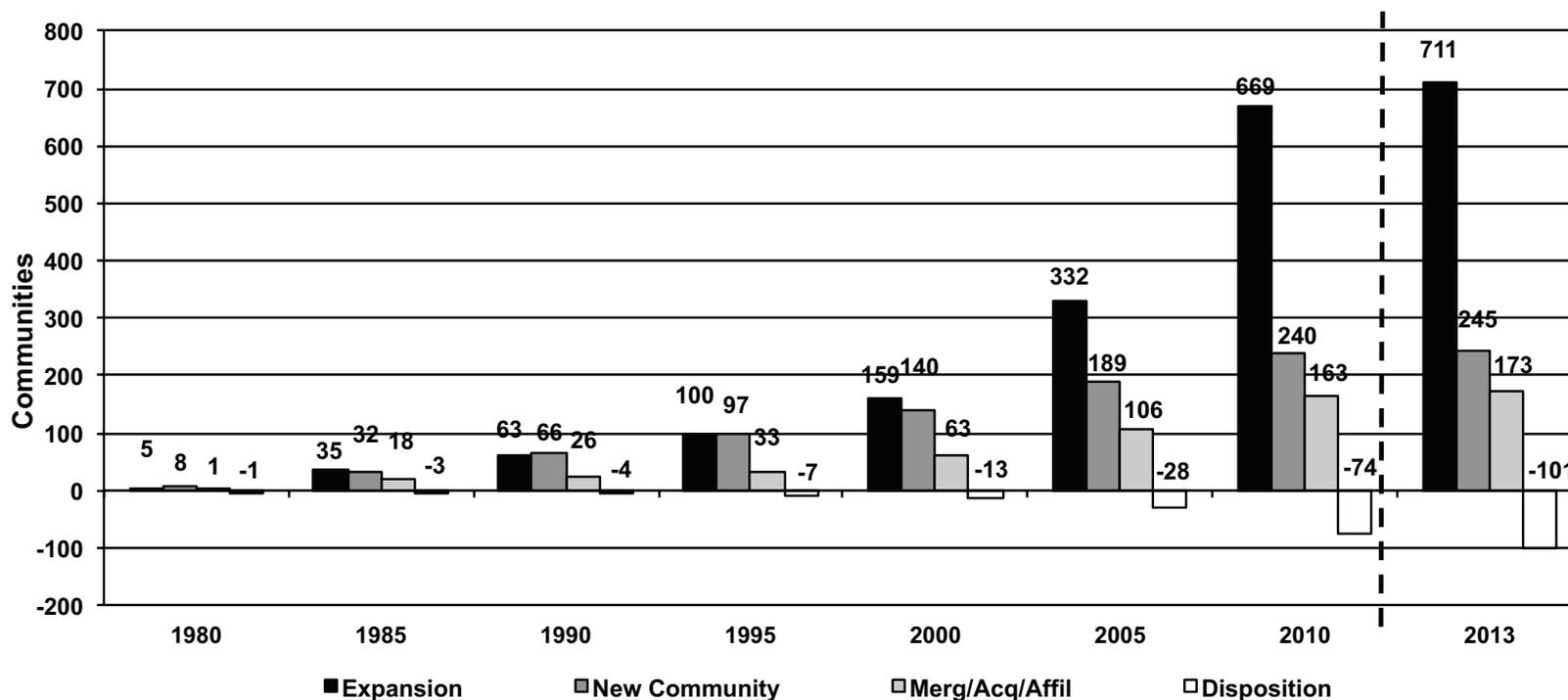
**Disposition:** The sale or closure of a community.

## 5-9 2014 LeadingAge Ziegler 150

### 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.

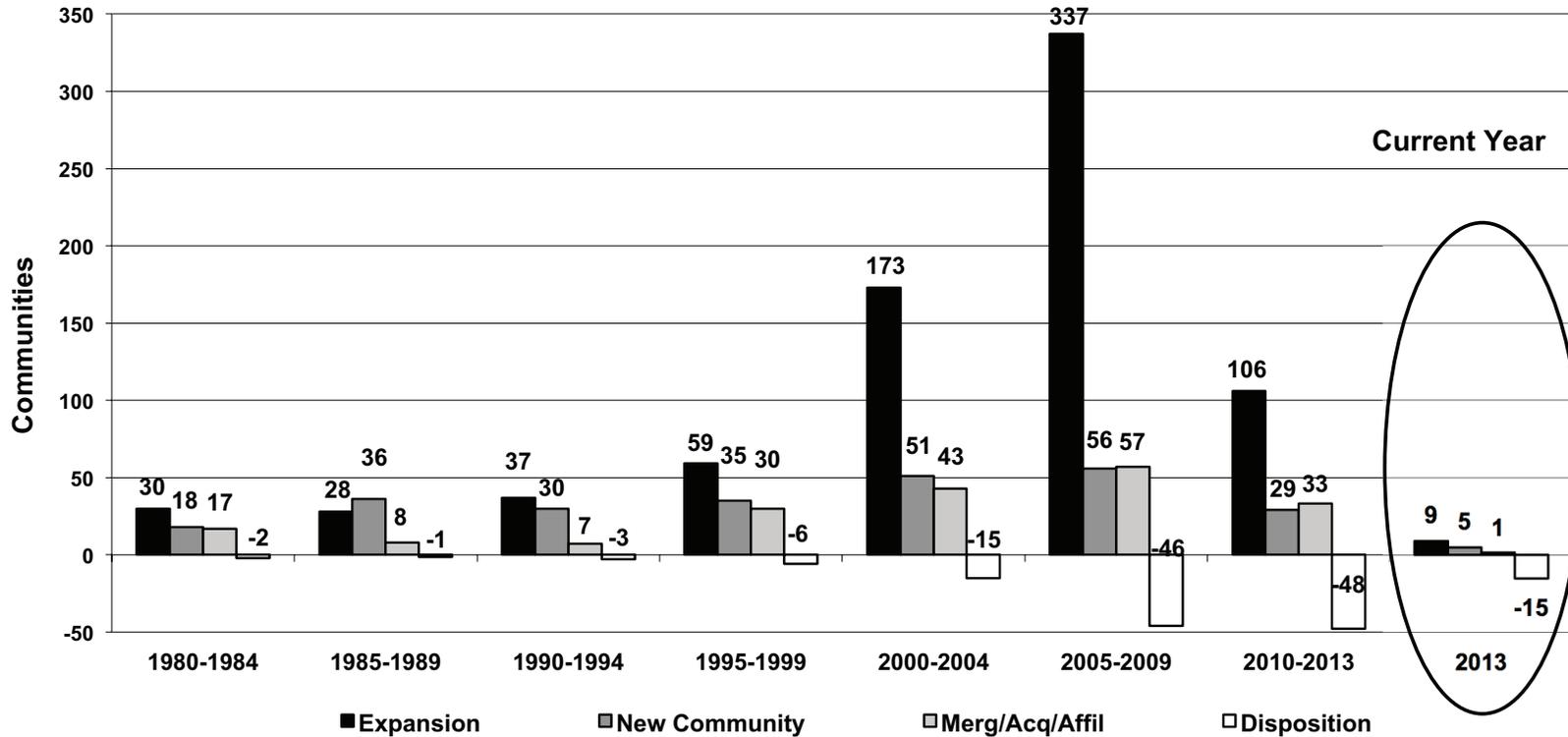
**New Community:** Growth by the addition of units through construction of a new location.

**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 2014 LeadingAge Ziegler 150

## 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.

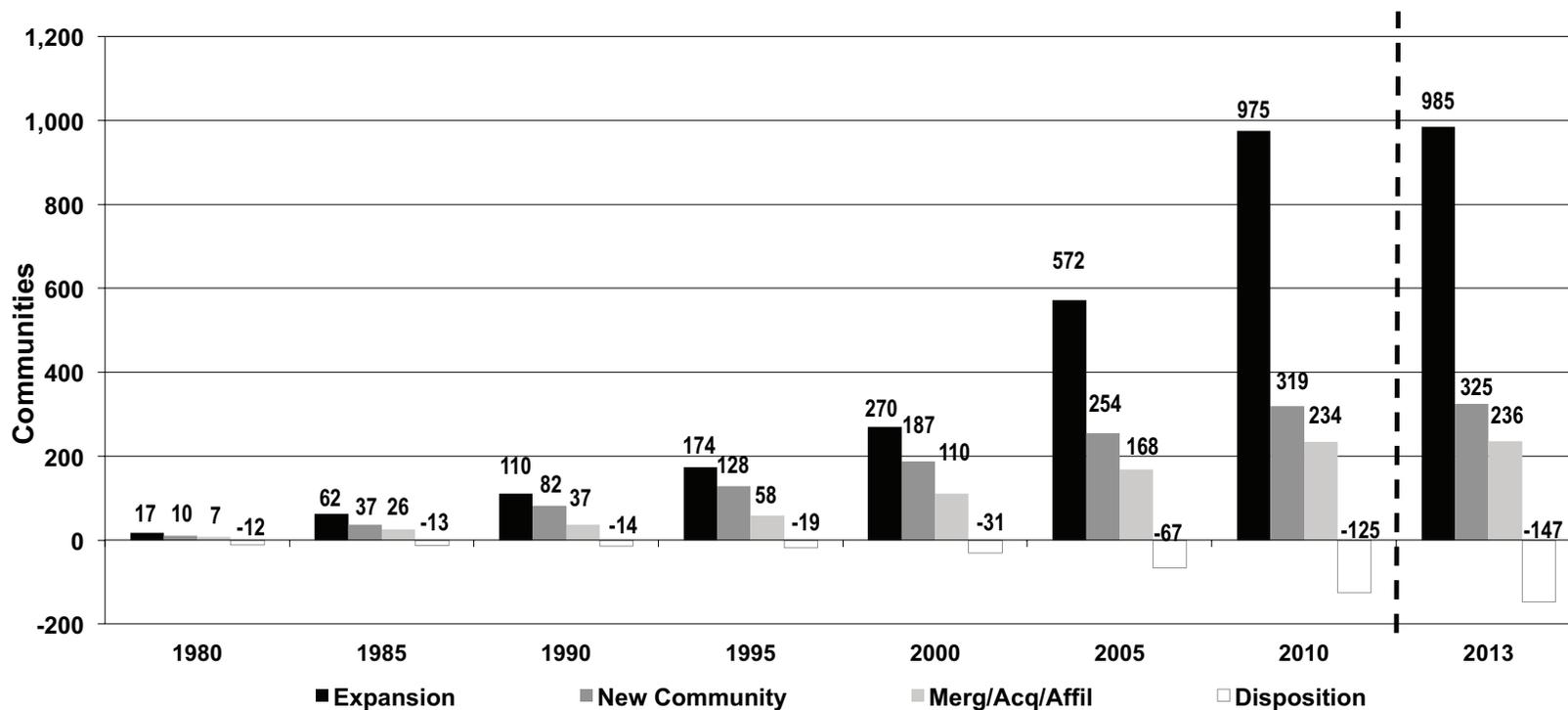
**Disposition:** The sale or closure of a community.

## 5-9 2014 LeadingAge Ziegler 150

### Growth: Type of Growth by Communities

#### 5-9g CUMULATIVE GROWTH OF LARGEST 100 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.

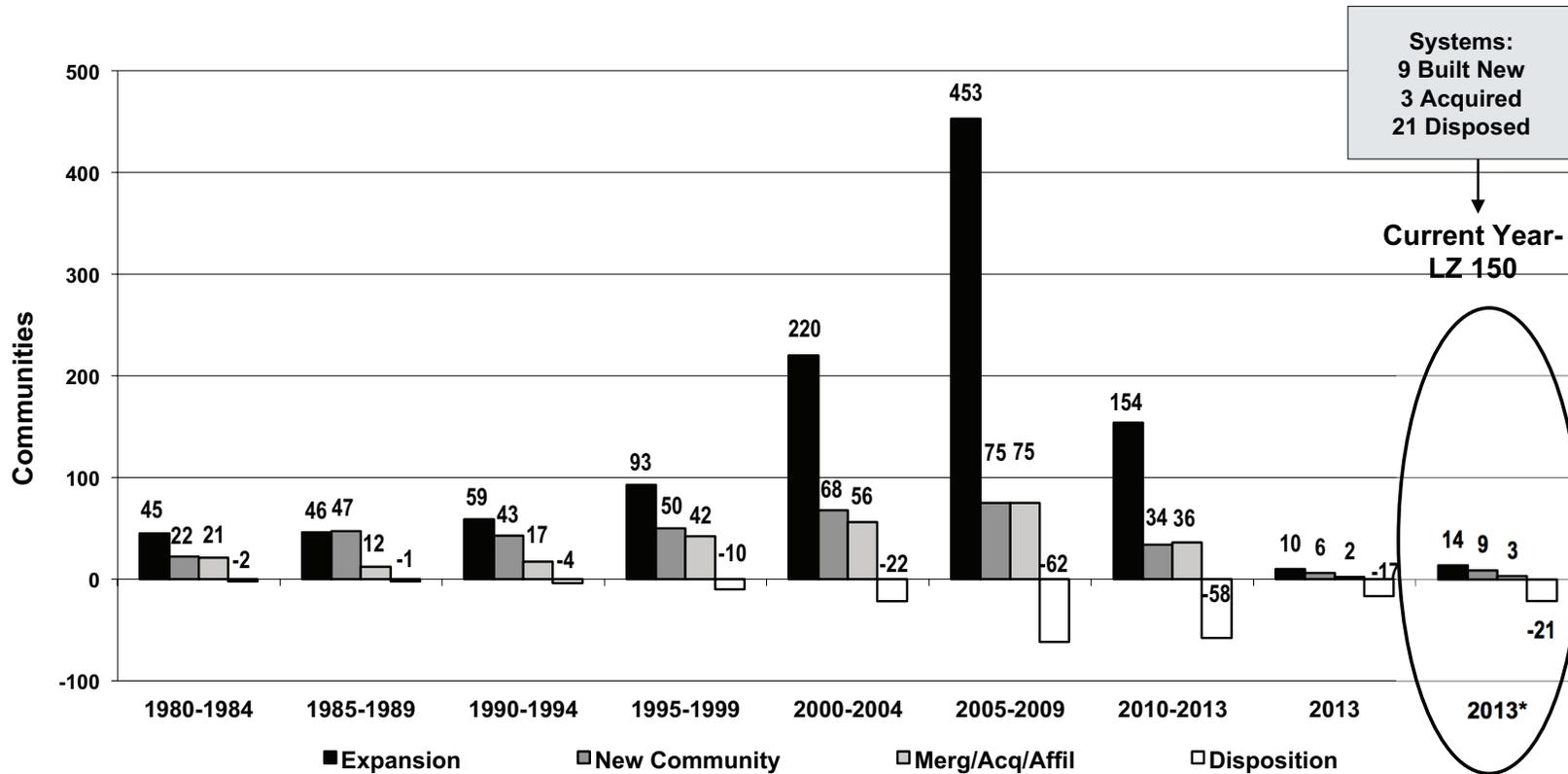
**New Community:** Growth by the addition of units through construction of a new location.

**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 2014 LeadingAge Ziegler 150

## Growth: Type of Growth by Communities 5-9h INCREMENTAL GROWTH OF LZ 150



**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.

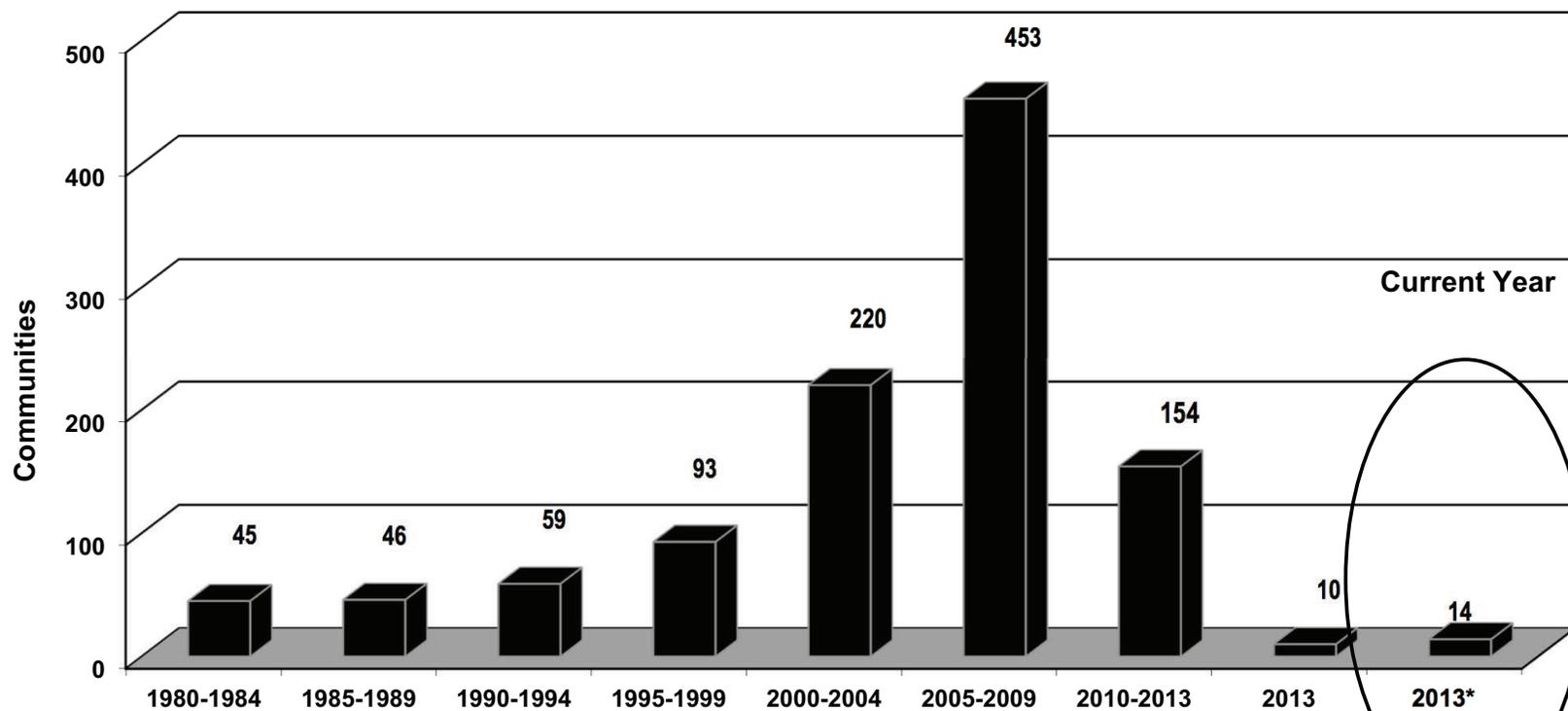
**Disposition:** The sale or closure of a community.

\*Reflects increase to largest 150 with 2014 publication.

## 5-10 2014 LeadingAge Ziegler 150

### Growth: Expansions

#### 5-10a 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. \*Reflects increase to largest 150 with 2014 publication

## 5-10 2014 LeadingAge Ziegler 150

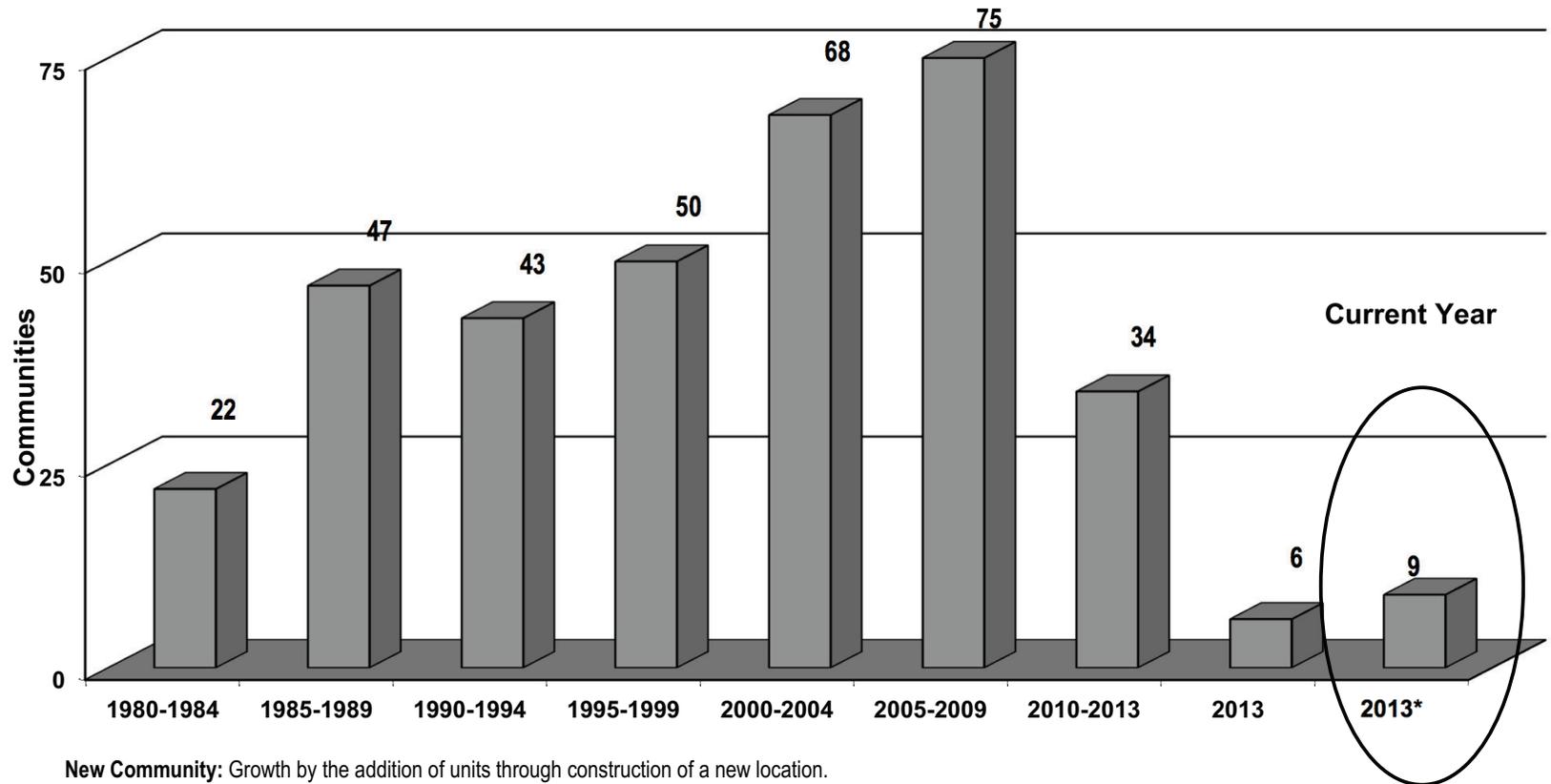
### Growth: Expansions

#### 5-10b HISTORICAL GROWTH

2014 Rank	System Name	Community	City	State	Community Type
17	Christian Homes, Inc.	Hickory Point Christian Village	Forsyth	IL	CCRC
20	Masonic Villages	Masonic Village at Elizabethtown	Elizabethtown	PA	CCRC
21	Volunteers of America	Anoka Rehabilitation and Living Center	Anoka	MN	SNF
24	Willow Valley Communities	Willow Valley Manor	Lancaster	PA	CCRC
33	Homewood Retirement Centers	Homewood at Frederick	Frederick	MD	CCRC
33	Homewood Retirement Centers	Homewood at Spring House Estates	Everett	PA	CCRC
45	WesleyLife	The Cottages	Pella	IA	AL/SN
48	Greencroft Communities	Southfield Village	South Bend	IN	CCRC
48	Greencroft Communities	Oak Grove Christian Retirement Village	DeMotte	IN	CCRC
54	Lutheran Life Communities	Pleasant View	Ottaw	IL	CCRC
109	Christian Living Communities	Clermont Park	Denver	CO	CCRC
115	Landis Communities	Landis Homes	Lititz	PA	CCRC
121	Messiah Lifeways	Messiah Family Services	Mount Joy	PA	IL
139	Lutheran Social Services of the South, Inc.	Copperfield Village	Victoria	TX	IL

## 5-11 2014 LeadingAge Ziegler 150

Growth: New Communities  
5-11a HISTORICAL GROWTH



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

*\*Reflects increase to largest 150 with the 2014 publication.*

## 5-11 2014 LeadingAge Ziegler 150

### Growth: New Communities

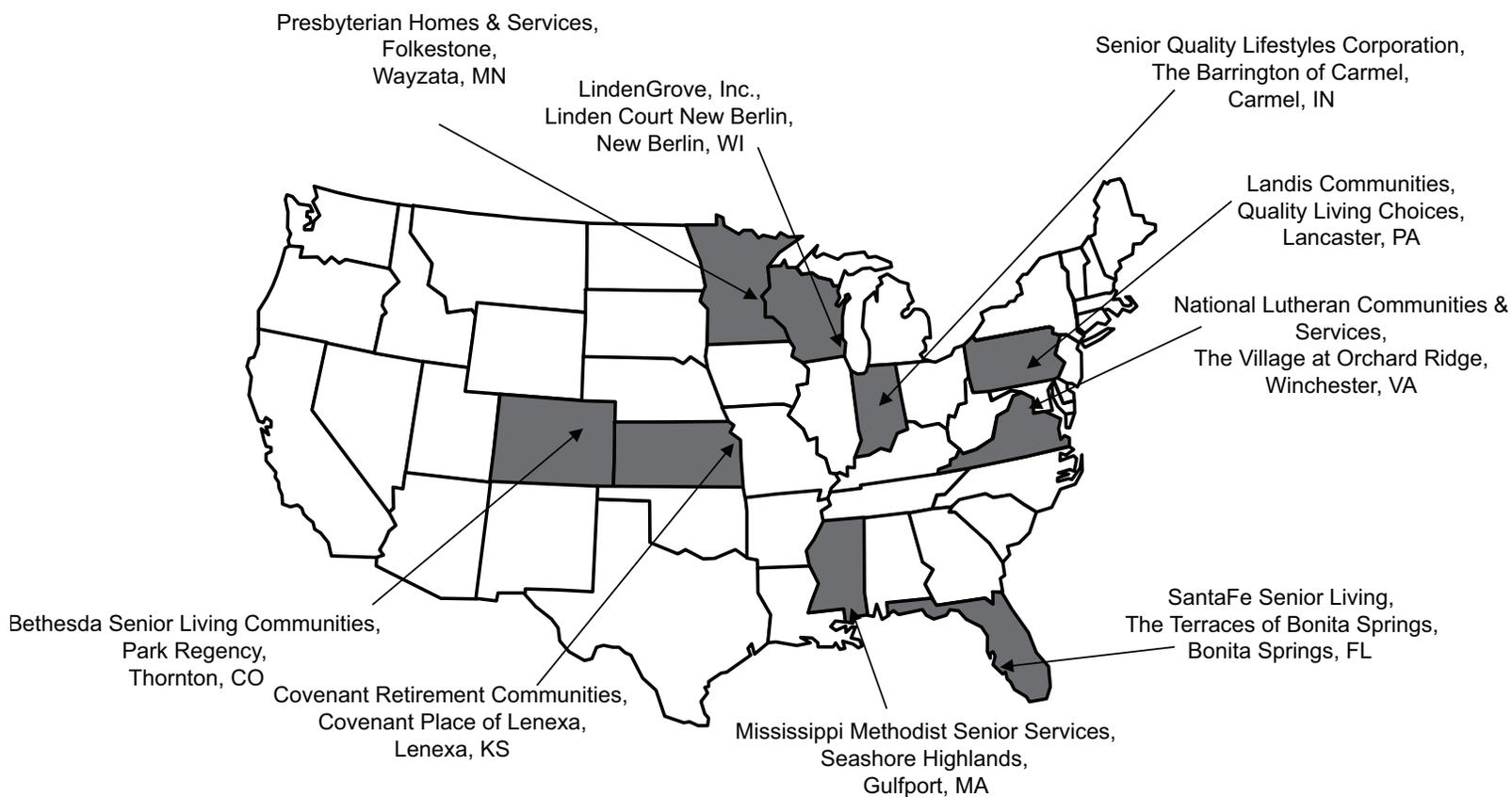
#### 5-11b 2013 COMMUNITY OPENINGS

2014 Rank	System Name	Community	City	State	Community Type
4	Presbyterian Homes & Services	Folkestone	Wayzata	MN	CCRC
5	Covenant Retirement Communities	Covenant Place of Lenexa	Lenexa	KS	CCRC
30	Senior Quality Lifestyles Corporation	The Barrington of Carmel	Carmel	IN	CCRC
44	Mississippi Methodist Senior Services, Inc.	Seashore Highlands	Gulfport	MS	IL
50	Bethesda Senior Living Communities	Park Regency	Thornton	CO	ALF
58	SantaFe Senior Living	The Terraces at Bonita Springs	Bonita Springs	FL	CCRC
115	Landis Communities	Quality Living Choices	Lancaster	PA	IL
129	National Lutheran Communities & Services	The Village at Orchard Ridge	Winchester	VA	CCRC
131	LindenGrove, Inc.	Linden Court New Berlin	New Berlin	WI	ALF

## 5-11 2014 LeadingAge Ziegler 150

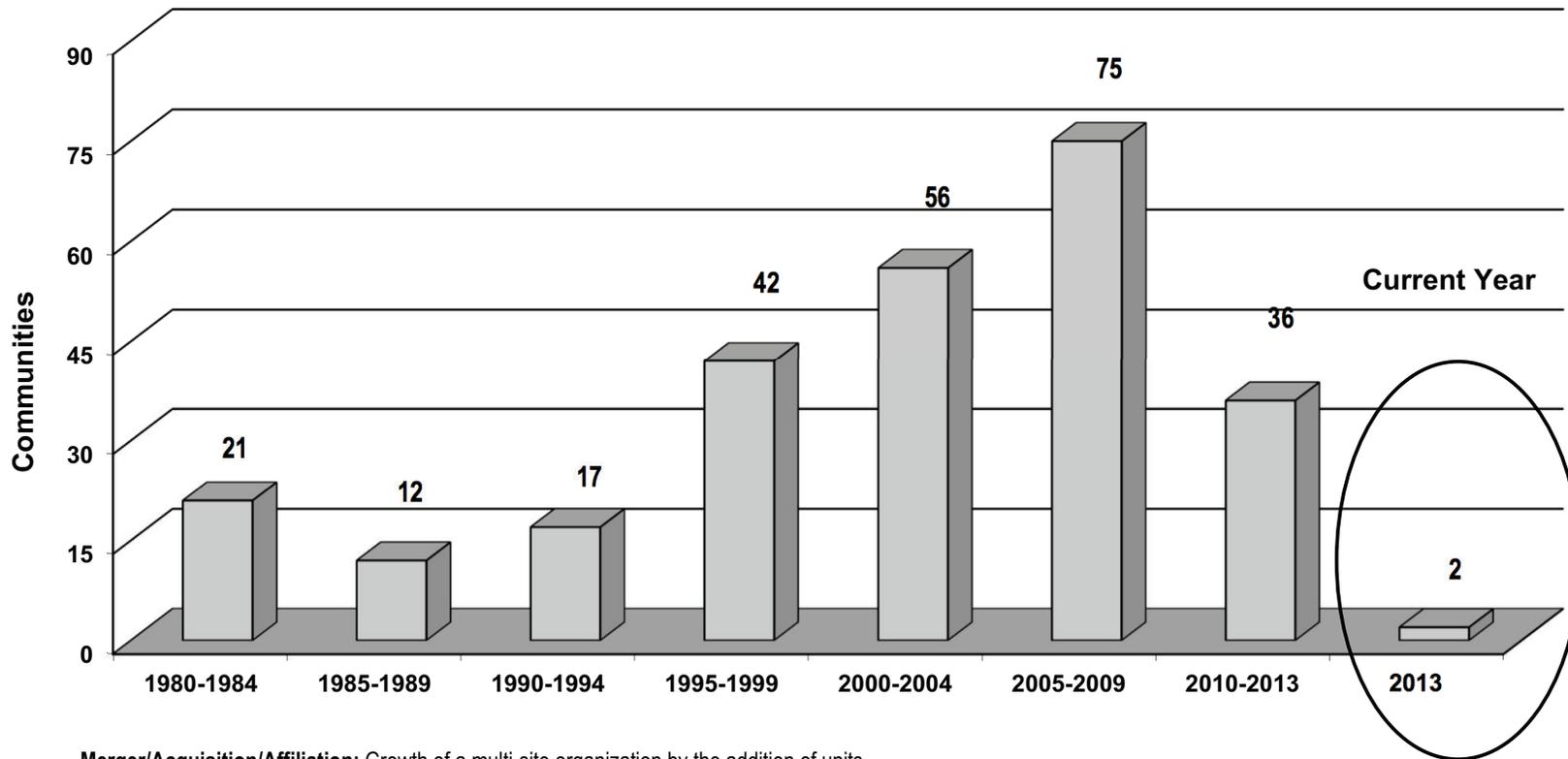
### Growth: New Communities

#### 5-11c 2013 LOCATIONS



## 5-12 2014 LeadingAge Ziegler 150

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.

LeadingAge 150 Ziegler

## 5-12 2014 LeadingAge Ziegler 150

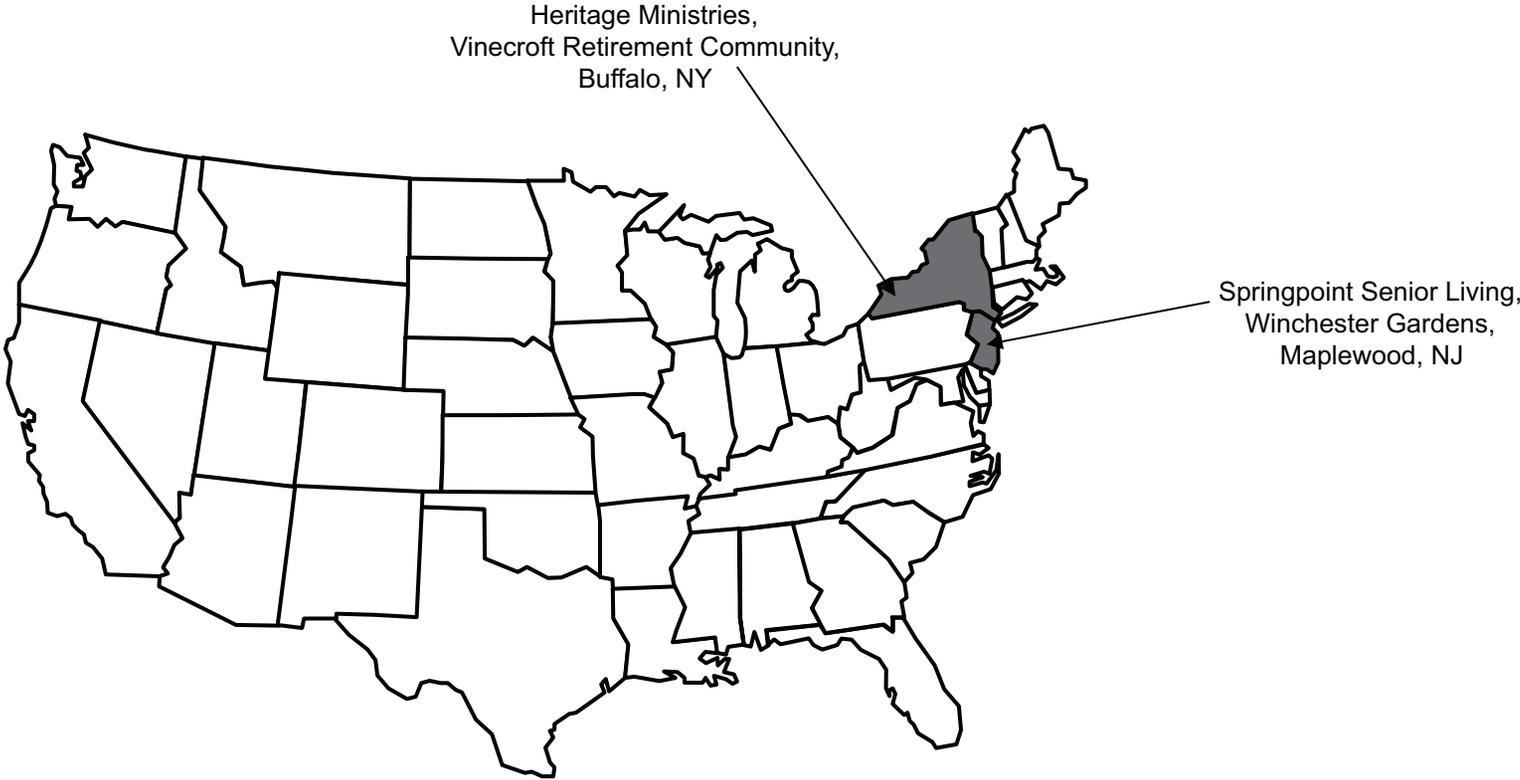
### Growth: Mergers/Acquisitions/Affiliations

#### 5-12b 2013 MERGERS/ACQUISITIONS/AFFILIATIONS

2014 Rank	System Name	Community	City	State	Community Type
25	Springpoint Senior Living	Winchester Gardens	Maplewood	NJ	CCRC
134	Heritage Ministries	Vinecroft Retirement Community	Buffalo	NY	IL

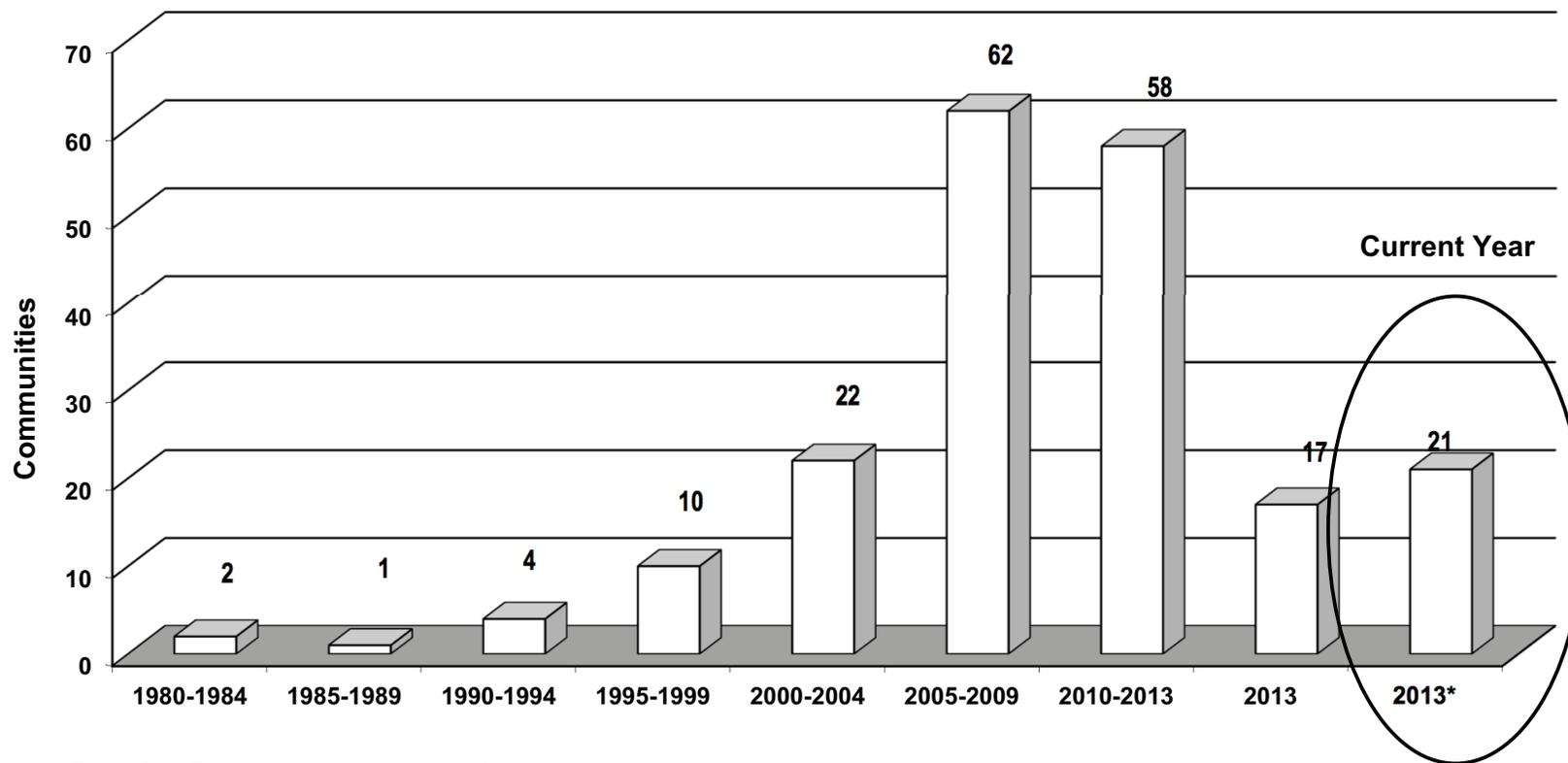
# 5-12 2014 LeadingAge Ziegler 150

Growth: Mergers/Acquisitions/Affiliations  
5-12c 2013 LOCATIONS



## 5-13 2014 LeadingAge Ziegler 150

Growth: Dispositions  
5-13a HISTORICAL GROWTH



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

\*Reflects increase to largest 150 with the 2014 publication.

## 5-13 2014 LeadingAge Ziegler 150

### Growth: Dispositions

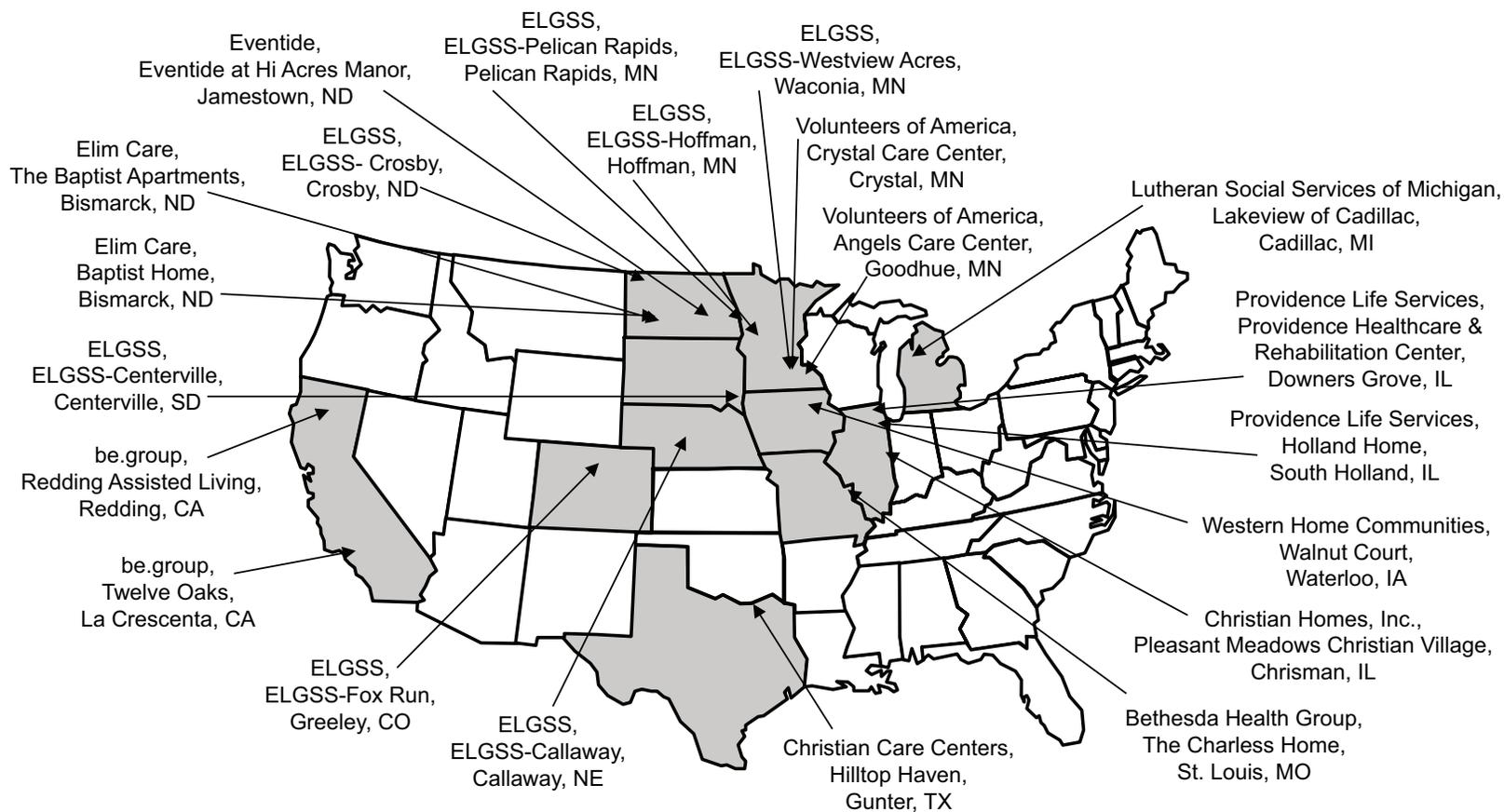
#### 5-13b 2013 COMMUNITY CLOSURES OR DISPOSITIONS

2014 Rank	System Name	Community	City	State	Community Type
1	Evangelical Lutheran Good Samaritan Society	Evangelical Good Samaritan Society-Fox Run	Greeley	CO	IL
1	Evangelical Lutheran Good Samaritan Society	Evangelical Good Samaritan Society Westview Acres	Waconia	MN	CCRC
1	Evangelical Lutheran Good Samaritan Society	Evangelical Good Samaritan Society-Hoffman	Hoffman	MN	SNF
1	Evangelical Lutheran Good Samaritan Society	Evangelical Good Samaritan Society-Crosby	Crosby	ND	SNF
1	Evangelical Lutheran Good Samaritan Society	Evangelical Good Samaritan Society-Callaway	Callaway	NE	SNF
1	Evangelical Lutheran Good Samaritan Society	Evangelical Good Samaritan Society-Centerville	Centerville	SD	SNF
1	Evangelical Lutheran Good Samaritan Society	Evangelical Good Samaritan Society-Pelican Rapids	Pelican Rapids	MN	ALF
17	Christian Homes, Inc.	Pleasant Meadows Christian Village	Chrisman	IL	CCRC
21	Volunteers of America	Crystal Care Center	Crystal	MN	SNF
21	Volunteers of America	Angels Care Center	Goodhue	MN	SNF
36	Elim Care, Inc.	The Baptist Apartments	Bismarck	ND	IL
36	Elim Care, Inc.	Baptist Home, Inc.	Bismarck	ND	SNF
38	Providence Life Services	Holland Home	South Holland	IL	IL/AL
38	Providence Life Services	Providence Healthcare and Rehabilitation Center	Downers Grove	IL	SNF
49	Bethesda Health Group, Inc.	The Charless Home	St. Louis	MO	CCRC
51	be.group	Redding Assisted Living	Redding	CA	ALF
51	be.group	Twelve Oaks	La Crescenta	CA	ALF
101	Western Home Communities	Walnut Court	Waterloo	IA	IL
105	Lutheran Social Services of Michigan	Lakeview of Cadillac	Cadillac	MI	SNF
106	Christian Care Centers	Hilltop Haven	Gunter	TX	SNF
110	Eventide	Eventide at Hi Acres Manor	Jamestown	ND	IL

## 5-13 2014 LeadingAge Ziegler 150

### Growth: Dispositions

#### 5-13c LOCATIONS



ELGSS: Evangelical Lutheran Good Samaritan Society

## Chapter 6

### Additional Listings

Three additional listings have been added to the LZ 150 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 the LZ 150, these lists are composed of LeadingAge members that fit within these specific categories. Like the rest of the LZ 150, these are quantitative, not qualitative, listings. It should be noted that the listings in Chapter 6 continue to reflect the largest 100 and were not expanded to the largest 150 as with the multi-site listings.

### Single-Campus Senior Living Communities

A single-campus senior living community offers care at one location, or campus (Chart 6-1a). The single-campus communities are ranked by number of units. The single-campus organizations listed in Chapter 6 are not part of a system, but are single-site organizations. These organizations may offer additional services, such as home-based care in the greater community, but oversee only one facility-based operation. The vast majority of these organizations are CCRCS. Of the largest 100, 63 of the 100 verified their information by participating in the 2014 survey.

New to the 2014 publication are additional data regarding the single-site organizations. Chart 6-1b shows that 70% of these organizations offer some type of home-based care, whether to their own residents or to individuals in the greater community. Figure 6-1c reveals that the majority of these organizations have adopted Electronic Medical/Health Records (EMR/EHR) and Electronic Point of Care/Point of Service (POC/POS) Documentation Systems.

## 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 150 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 150 #34 (**Primary Ranking**) with 1,616 total market-rate units; the organization is ranked #1 among this year's listing of affordable housing providers with 18,910 total affordable units (Chart 6-2), an increase of nearly 2,000 affordable units in the past year. By aggregating these two categories of seniors housing, the organization is the second largest among the LZ 150 with 20,526 total units.

## 6-1 2014 LeadingAge Ziegler 150

### Additional Listings: Single-Campus Senior Living Communities

#### 6-1a THE NATION'S 100 LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING

2014 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/13)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
1	Charlestown Community, Inc	Catonsville	MD	1,815	1,484	125	206	81.8%	6.9%	11.3%
2	John Knox Village	Lee's Summit	MO	1,622	1,078	158	386	66.5%	9.7%	23.8%
3	Henry Ford Village	Dearborn	MI	1,042	857	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, Inc.	Pompano Beach	FL	970	729	64	177	75.2%	6.6%	18.2%
7	Charles E. Smith Life Communities	Rockville	MD	884	250	78	556	28.3%	8.8%	62.9%
8	Westminster Canterbury Richmond	Richmond	VA	841	514	169	158	61.1%	20.1%	18.8%
9	St. John's Homes & Meadows	Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
10	Cross Keys Village - The Brethren Home Community	New Oxford	PA	810	449	91	270	55.4%	11.2%	33.3%
11	Friendship Village Tempe	Tempe	AZ	794	575	91	128	72.4%	11.5%	16.1%
12	Menorah Park Center for Senior Living	Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
13	Lakeview Village, Inc.	Lenexa	KS	764	566	26	172	74.1%	3.4%	22.5%
14	Brethren Village	Lititz	PA	758	497	141	120	65.6%	18.6%	15.8%
15	Mennonite Home Communities	Lancaster	PA	751	413	150	188	55.0%	20.0%	25.0%
16	Glencroft Retirement Community	Glendale	AZ	715	391	99	225	54.7%	13.8%	31.5%
17	Atlantic Shores Cooperative Association	Virginia Beach	VA	671	555	66	50	82.7%	9.8%	7.5%
18	Miami Jewish Health Systems	Miami	FL	656	102	92	462	15.5%	14.0%	70.4%
19	Beatitudes Campus	Phoenix	AZ	649	456	121	72	70.3%	18.6%	11.1%
20	Copeland Oaks Retirement Community	Sebring	OH	635	366	79	190	57.6%	12.4%	29.9%
21	Westminster Canterbury on Chesapeake Bay	Virginia Beach	VA	629	439	95	95	69.8%	15.1%	15.1%
22	La Posada at Park Centre, Inc.	Green Valley	AZ	618	473	145	0	76.5%	23.5%	0.0%
23	Carolina Meadows, Inc.	Chapel Hill	NC	616	447	79	90	72.6%	12.8%	14.6%
24	Air Force Village West	Riverside	CA	591	440	92	59	74.5%	15.6%	10.0%
25	St. Joseph's John Knox Village	Tampa	FL	589	265	161	163	45.0%	27.3%	27.7%

Note: Five of the communities reported being managed by a third party

## 6-1 2014 LeadingAge Ziegler 150

### Additional Listings: Single-Campus Senior Living Communities

#### 6-1a THE NATION'S 100 LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING

2014 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/13)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	Springmoor Life Care Retirement Community	Raleigh	NC	589	398	18	173	67.6%	3.1%	29.4%
27	The Army Residence Community	San Antonio	TX	584	445	48	91	76.2%	8.2%	15.6%
28	Twin Lakes Community	Burlington	NC	572	400	52	120	69.9%	9.1%	21.0%
29	The Philadelphia Protestant Home	Philadelphia	PA	567	266	175	126	46.9%	30.9%	22.2%
30	Franklin United Methodist Community	Franklin	IN	566	197	161	208	34.8%	28.4%	36.7%
31	Wesley Willows	Rockford	IL	563	302	170	91	53.6%	30.2%	16.2%
32	Moorings Park	Naples	FL	563	384	73	106	68.2%	13.0%	18.8%
33	Pine Run Retirement Community	Doylestown	PA	561	288	146	127	51.3%	26.0%	22.6%
34	St. Camillus	Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
35	Carroll Lutheran Village	Westminster	MD	551	398	50	103	72.2%	9.1%	18.7%
36	Casa de las Campanas	San Diego	CA	548	377	72	99	68.8%	13.1%	18.1%
37	Royal Oaks Lifecare Community	Sun City	AZ	544	360	59	125	66.2%	10.8%	23.0%
38	Rolling Green Village	Greenville	SC	544	420	50	74	77.2%	9.2%	13.6%
39	Masonic Care Community of New York	Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
40	The Mennonite Village	Albany	OR	524	298	131	95	56.9%	25.0%	18.1%
41	Bridgewater Retirement Community	Bridgewater	VA	519	246	134	139	47.4%	25.8%	26.8%
42	The Lutheran Home	Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
43	The Advent Christian Village	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
44	Fleet Landing	Atlantic Beach	FL	508	354	74	80	69.7%	14.6%	15.7%
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	Havenwood Heritage Heights	Concord	NH	497	347	55	95	69.8%	11.1%	19.1%
48	Friendship Village Sunset Hills	St.Louis	MO	497	318	61	118	64.0%	12.3%	23.7%
49	Warm Hearth Village	Blacksburg	VA	495	285	150	60	57.6%	30.3%	12.1%
50	Lebanon Valley Brethren Home	Palmyra	PA	495	337	58	100	68.1%	11.7%	20.2%

Note: Five of the communities reported being managed by a third party

## 6-1 2014 LeadingAge Ziegler 150

### Additional Listings: Single-Campus Senior Living Communities

#### 6-1a THE NATION'S 100 LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING

2014 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/13)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	The Estates at Carpenters	Lakelanda	FL	493	372	49	72	75.5%	9.9%	14.6%
52	Marquette Manor	Indianapolis	IN	493	314	77	102	63.7%	15.6%	20.7%
53	C. C. Young	Dallas	TX	493	240	119	134	48.7%	24.1%	27.2%
54	Horizon House	Seattle	WA	476	386	90	0	81.1%	18.9%	0.0%
55	Deerfield Episcopal Retirement Community, Inc.	Asheville	NC	473	351	60	62	74.2%	12.7%	13.1%
56	White Horse Village	Newtown Square	PA	472	345	68	59	73.1%	14.4%	12.5%
57	Tel Hai Retirement Community	Honey Brook	PA	472	233	100	139	49.4%	21.2%	29.4%
58	Christian Health Care Center	Wyckoff	NJ	472	79	95	298	16.7%	20.1%	63.1%
59	Cypress Cove at HealthPark Florida, Inc.	Fort Myers	FL	470	362	44	64	77.0%	9.4%	13.6%
60	Virginia Mennonite Retirement Community	Harrisonburg	VA	469	263	86	120	56.1%	18.3%	25.6%
61	Marquardt Village, Inc.	Watertown	WI	469	281	48	140	59.9%	10.2%	29.9%
62	Carolina Village, Inc.	Hendersonville	NC	465	347	60	58	74.6%	12.9%	12.5%
63	La Vida Llana	Albuquerque	NM	464	330	84	50	71.1%	18.1%	10.8%
64	Masonic Pathways	Alma	MI	461	38	219	204	8.2%	47.5%	44.3%
65	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
66	Waterman Village	Mt. Dora	FL	454	255	79	120	56.2%	17.4%	26.4%
67	Mt. San Antonio Gardens	Pomona	CA	453	298	71	84	65.8%	15.7%	18.5%
68	Paradise Valley Estates	Fairfield	CA	451	323	68	60	71.6%	15.1%	13.3%
69	Emerald Communities	Redmond	WA	450	333	56	61	74.0%	12.4%	13.6%
70	Lutheran Social Services of Upstate New York	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
71	Aldersgate Village	Topeka	KS	445	176	60	209	39.6%	13.5%	47.0%
72	Falcons Landing	Potomac Falls	VA	444	313	71	60	70.5%	16.0%	13.5%
73	Aldersgate	Charlotte	NC	442	250	92	100	56.6%	20.8%	22.6%
74	Greenwood Village South	Greenwood	IN	441	259	45	137	58.7%	10.2%	31.1%
75	Cathedral Village	Philadelphia	PA	441	293	0	148	66.4%	0.0%	33.6%

Note: Five of the communities reported being managed by a third party

## 6-1 2014 LeadingAge Ziegler 150

### Additional Listings: Single-Campus Senior Living Communities

#### 6-1a THE NATION'S 100 LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING

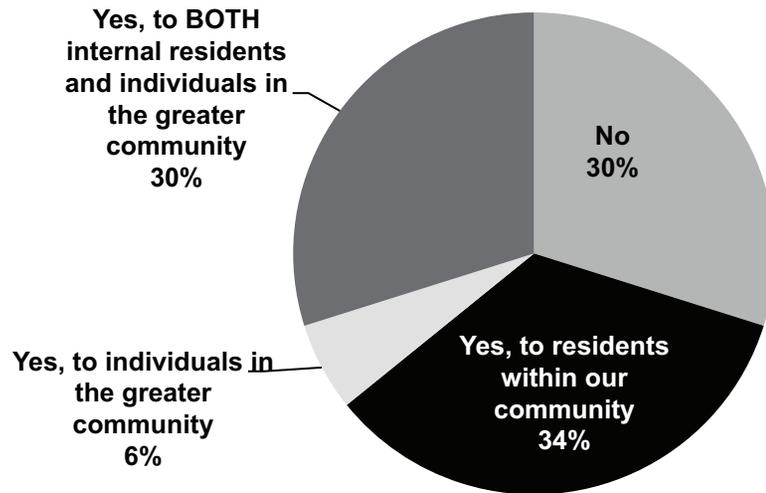
2014 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/13)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	Asbury Pointe	Getzville	NY	438	110	56	272	25.1%	12.8%	62.1%
77	Williamsburg Landing, Inc.	Williamsburg	VA	430	311	61	58	72.3%	14.2%	13.5%
78	Carol Woods Retirement Community	Chapel Hill	NC	430	311	89	30	72.3%	20.7%	7.0%
79	O'Connor Woods	Stockton	CA	428	251	77	100	58.6%	18.0%	23.4%
80	Laurel Lake	Hudson	OH	426	292	59	75	68.5%	13.8%	17.6%
81	Cornwall Manor	Cornwall	PA	426	288	30	108	67.6%	7.0%	25.4%
82	Forum at Rancho San Antonio	Cupertino	CA	425	319	58	48	75.1%	13.6%	11.3%
83	The Good Samaritan Home of Quincy	Quincy	IL	424	167	26	231	39.4%	6.1%	54.5%
84	Lutheran Community at Telford	Telford	PA	424	250	99	75	59.0%	23.3%	17.7%
85	Mease Manor	Dunedin	FL	422	216	106	100	51.2%	25.1%	23.7%
86	Westminster Canterbury of Lynchburg, Inc.	Lynchburg	VA	413	245	63	105	59.3%	15.3%	25.4%
87	Meadowood	Worcester	PA	411	296	56	59	72.0%	13.6%	14.4%
88	Indiana Masonic Home	Franklin	IN	404	183	84	137	45.3%	20.8%	33.9%
89	Penney Retirement Community	Penney Farms	FL	403	288	75	40	71.5%	18.6%	9.9%
90	Friendship Village Chesterfield	Chesterfield	MO	403	282	22	99	70.0%	5.5%	24.6%
91	Bay Village of Sarasota, Inc.	Sarasota	FL	403	286	22	95	71.0%	5.5%	23.6%
92	Willamette View, Inc.	Portland	OR	402	284	112	6	70.6%	27.9%	1.5%
93	Pennswood Village	Newtown	PA	400	310	37	53	77.5%	9.3%	13.3%
94	St. Paul Homes	Greenville	PA	398	86	120	192	21.6%	30.2%	48.2%
95	Dunwoody Village	Newtown Square	PA	398	236	81	81	59.3%	20.4%	20.4%
96	Kahala Senior Living Community, Inc.	Honolulu	HI	393	270	63	60	68.7%	16.0%	15.3%
97	Fellowship Senior Living	Basking Ridge	NJ	392	257	81	54	65.6%	20.7%	13.8%
98	Heath Village	Hackettstown	NJ	390	251	40	99	64.4%	10.3%	25.4%
99	Capital Manor	Salem	OR	390	282	108	0	72.3%	27.7%	0.0%
100	The Virginian	Fairfax	VA	386	224	62	100	58.0%	16.1%	25.9%
								<b>59.5%</b>	<b>15.8%</b>	<b>24.7%</b>

Note: Five of the communities reported being managed by a third party

## 6.1 2014 LeadingAge Ziegler 150

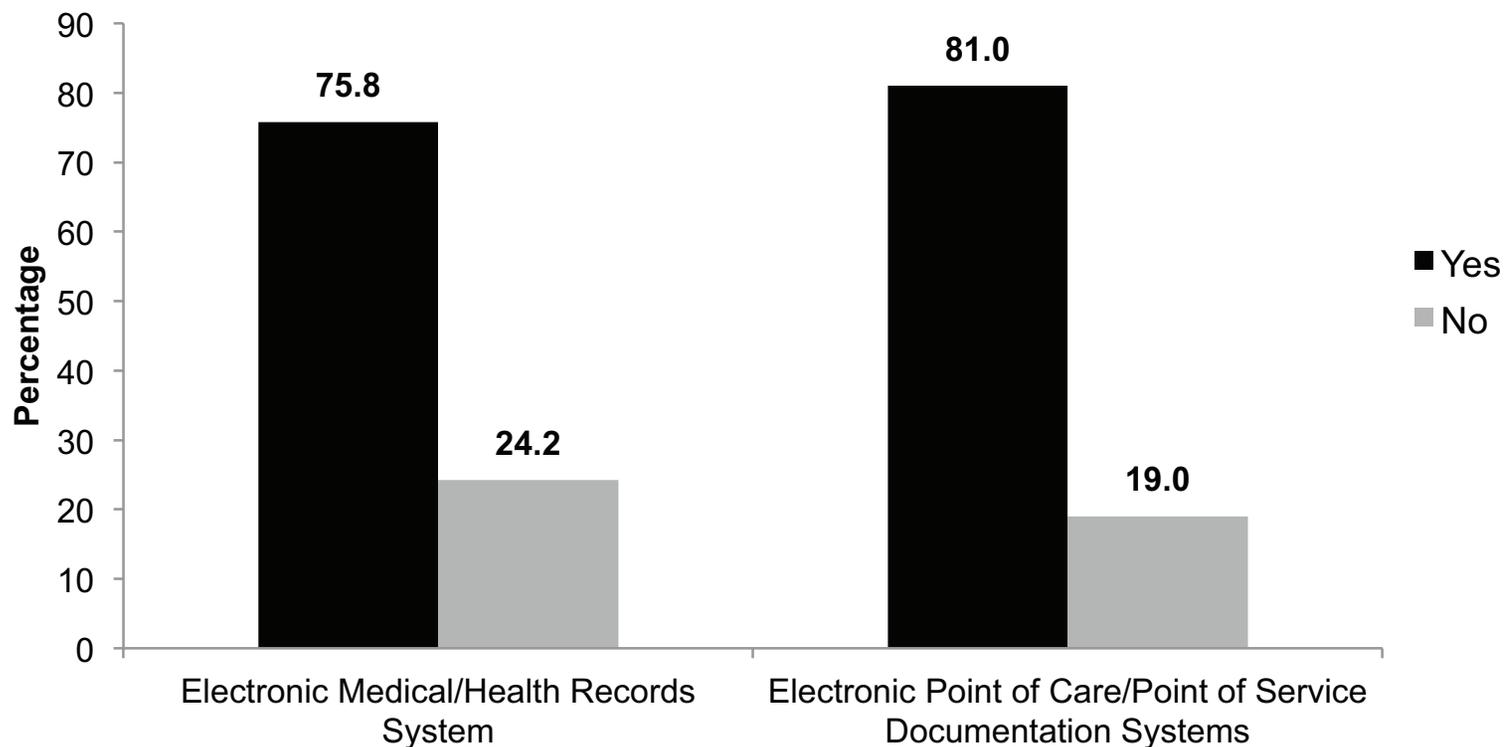
Additional Listings: Single-Campus Senior Living Communities  
6-1b Single-Campus Providers of HCBS

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



## 6.1 2014 LeadingAge Ziegler 150

Additional Listings: Single-Campus Senior Living Communities  
6-1c Technology Adoption: Single-Campus Providers



## 6-2 2014 LeadingAge Ziegler 150

### Additional Listings: Affordable Housing Providers

#### 6-2 THE LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2014 Aff. Hsng. Rank	2013 Aff. Hsng. Rank	System Name	State	Units	Communities
1	1	National Church Residences	OH	18,910	238
2	4	Mercy Housing, Inc.	CO	17,787	279
3	2	Retirement Housing Foundation	CA	11,031	122
4	3	Volunteers of America	VA	9,974	166
5	5	Christian Church Homes of Northern California	CA	5,052	61
6	7	Elderly Housing Development and Operations Corporation (EHDOC)	FL	4,900	54
7	7	Senior Housing Assistance Group	WA	4,329	26
8	17	be.group	CA	2,694	26
9	9	TELACU Residential Management	CA	2,625	35
10	19	Cornerstone Affiliates	CA	2,426	32
11	10	Catholic Housing Management	FL	2,246	14
12	12	CARING Housing Ministries	CA	2,127	9
13	30	Presby's Inspired Life	PA	2,103	27
14	13	United Church Homes, Inc.	OH	2,074	49
15	14	Westminster Communities of Florida	FL	2,032	10
16	15	Christopher Homes	LA	1,860	13
17	18	Springpoint Senior Living, Inc.	NJ	1,755	18
18	21	Catholic Charities Senior Communities	MD	1,705	23
19	20	Salvation Army Silvercrest Management of California	CA	1,678	19
20	NR	Consecre Housing Network	IL	1,617	24
21	22	Satellite Housing	CA	1,586	23
22	23	Oklahoma City Housing Authority	OK	1,386	10
23	24	Catholic Charities of Chicago	IL	1,372	18
24	27	Evangelical Lutheran Good Samaritan Society	SD	1,351	32
25	25	Victory Housing	MD	1,347	16

NR: Not Ranked in 2013

## 6-2 2014 LeadingAge Ziegler 150

### Additional Listings: Affordable Housing Providers

#### 6-2 THE LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2014 Aff. Hsng. Rank	2013 Aff. Hsng. Rank	System Name	State	Units	Communities
26	11	New Samaritan Corp, Elderly Housing Management, Inc	CT	1,251	31
27	NR	Menorah Housing Foundation	CA	1,221	18
28	29	Lutheran Social Services of Illinois	IL	1,166	15
29	28	Jewish Community Housing for the Elderly	MA	1,117	8
30	34	LSC Service Corp	OH	1,092	6
31	32	Wesley Senior Ministries	TN	1,088	16
32	26	Presbyterian Villages of Michigan	MI	1,064	22
33	31	Pacific Retirement Services	OR	1,045	24
34	33	Presbyterian SeniorCare	PA	999	22
35	39	Presbyterian Senior Living	PA	983	14
36	35	Union Labor Retirement Association	OR	884	6
37	36	Lutheran Social Services of Central Ohio	OH	880	19
38	37	Wesley Woods Senior Living	GA	874	4
39	38	Selfhelp Community Services	NY	864	5
40	71	Episcopal Retirement Homes, inc	OH	837	14
41	41	Christian Care Communities, Inc.	KY	783	5
42	40	Hebrew SeniorLife	MA	766	3
43	42	Avesta Housing	ME	742	34
44	43	DePaul Housing Management Corporation	NY	704	14
45	45	Lutheran Homes Society	OH	651	12
46	47	Aging True	FL	637	4
47	44	Episcopal Senior Communities	CA	626	6
48	48	St. Andrew's Resources for Seniors System	MO	604	13
49	49	Northern California Presbyterian Homes and Services, Inc.	CA	600	3
50	NR	Community Housing Management Services	CA	548	11

NR: Not Ranked in 2013

## 6-2 2014 LeadingAge Ziegler 150

### Additional Listings: Affordable Housing Providers

#### 6-2 THE LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2014 Aff. Hsng. Rank	2013 Aff. Hsng. Rank	System Name	State	Units	Communities
51	50	Jewish Senior Life of Metropolitan Detroit	MI	538	0
52	51	The Lesley Foundation	CA	534	5
53	52	Christian Concern Management and Development Corporation	PA	515	6
54	46	Lutheran Social Ministries of New Jersey	NJ	498	7
55	54	Jewish Home Lifecare	NY	482	4
56	55	Plano Community Home Sponsored Properties	TX	474	8
57	58	Lutheran Senior Services	MO	459	6
58	56	Presbyterian Homes of Georgia, inc.	GA	458	2
59	57	CJE SeniorLife	IL	455	7
60	53	Ecumen	MN	372	7
61	60	Jewish Community Housing Corporation	NJ	369	3
62	61	Bethany Community Services	MA	364	3
63	62	Phoebe Ministries	PA	356	8
64	63	Greencroft Communities	IN	352	2
65	64	Lutheran Social Services of Michigan	MI	340	5
66	66	Diakon Lutheran Social Ministries	PA	335	4
67	65	Goodwill Industries Suncoast	FL	335	5
68	67	Lincoln Lutheran	WI	335	2
69	68	Family Housing Management Company	FL	326	4
70	69	Spokane Baptist Association Homes	WA	321	2
71	70	Methodist Retirement Communities	TX	319	5
72	72	Mississippi Methodist Senior Services, Inc.	MS	313	0
73	73	United Methodist Homes of New Jersey	NJ	300	5
74	74	Presbyterian Homes and Services	MN	293	3
75	77	Augustana Care Corporation	MN	271	0

NR: Not Ranked in 2013

## 6-2 2014 LeadingAge Ziegler 150

### Additional Listings: Affordable Housing Providers

#### 6-2 THE LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2014 Aff. Hsng. Rank	2013 Aff. Hsng. Rank	System Name	State	Units	Communities
76	78	Porter Hills Retirement Communities and Services	MI	270	6
77	79	Santa Clara Methodist Retirement Foundation	CA	257	2
78	80	Christian Care Companies	AZ	247	3
79	81	Maple Knoll Communities, Inc.	OH	243	3
80	82	Sholom Community Alliance	MN	241	3
81	83	Wellspring Lutheran Services	MI	231	5
82	84	Lutheran Homes of Oshkosh	WI	217	1
83	NR	Loretto	NY	208	7
84	85	Woodmere and Crescent Park Senior Housing	NJ	200	2
85	86	BHI Senior Living	IN	198	0
86	87	Saint Elizabeth Community	RI	197	1
87	88	Lutheran Social Services Group	NY	196	6
88	NR	Givens Estates	NC	178	2
89	90	Jewish Senior Housing & Healthcare	NJ	178	2
90	91	Guardian Angels of Elk River	MN	177	5
91	92	Milton Residences for the Elderly	MA	167	0
92	93	Moravian Care Ministries	MN	167	0
93	95	Eaton Senior Communities	CO	161	1
94	NR	Providence Life Services	IL	161	2
95	NR	Presbyterian Senior Care of WNY, Inc.	NY	150	1
96	96	United Church Homes and Services	NC	150	4
97	98	Sears Methodist Retirement System, Inc.	TX	149	2
98	100	Presbyterian Homes and Services	NY	148	0
99	NR	Franciscan Communities, Inc.	IL	139	3
100	89	Evangelical Homes of Michigan	MI	130	3

NR: Not Ranked in 2013

## 6-3 2014 LeadingAge Ziegler 150

### Additional Listings: Multi-site Senior Living Providers

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

Rank	2014 LZ 150 Rank	System Name	State	Units (as of 12/31/13)				
				Total	ILU	ALU	NCB	AFF
1	34	National Church Residences	OH	20,526	604	472	540	18,910
2	1	Evangelical Lutheran Good Samaritan Society	SD	19,637	4,936	2,194	11,156	1,351
3	NR	Mercy Housing, Inc.	CO	17,787	0	0	0	17,787
4	2	National Senior Campuses	MD	17,682	15,247	1,173	1,262	0
5	6	Retirement Housing Foundation	CA	15,135	2,636	873	595	11,031
6	21	Volunteers of America	VA	12,309	480	707	1,148	9,974
7	3	ACTS Retirement Services, Inc.	PA	8,051	5,711	907	1,433	0
8	4	Presbyterian Homes and Services	MN	7,075	3,339	2,065	1,378	293
9	13	Cornerstone Affiliates	CA	5,386	1,735	368	857	2,426
10	10	Westminster Communities of Florida	FL	5,344	2,106	455	751	2,032
11	NR	Christian Church Homes of Northern California	CA	5,052	0	0	0	5,052
12	NR	Elderly Housing Development and Operations Corporation (EHDOC)	FL	4,900	0	0	0	4,900
13	5	Covenant Retirement Communities, Inc.	IL	4,703	3,110	758	835	0
14	NR	Senior Housing Assistance Group	WA	4,329	0	0	0	4,329
15	12	Presbyterian Senior Living	PA	4,159	1,425	499	1,252	983
16	7	Lifespace Communities, Inc.	IA	4,072	3,093	154	825	0
17	51	be.group	CA	4,053	859	268	232	2,694
18	15	Pacific Retirement Services	OR	3,869	2,092	344	388	1,045
19	11	Lutheran Senior Services	MO	3,818	1,669	710	980	459
20	25	Springpoint Senior Living, Inc.	NJ	3,736	1,445	279	257	1,755
21	8	The Kendal Corporation	PA	3,727	2,554	617	556	0
22	12	Ohio Presbyterian Retirement Services	OH	3,147	1,669	557	796	125
23	77	Presby's Inspired Life	PA	3,068	491	214	260	2,103
24	76	United Church Homes, Inc.	OH	3,057	110	205	668	2,074
25	14	Front Porch Communities and Services	CA	2,935	1,816	481	538	100

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

\*\* NR: No Rank. Not in the 2014 LZ 150 Primary Ranking

## 6-3 2014 LeadingAge Ziegler 150

### Additional Listings: Multi-site Senior Living Providers

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

Rank	2014 LZ 150 Rank	System Name	State	Units (as of 12/31/13)				
				Total	ILU	ALU	NCB	AFF
26	16	Asbury Communities	MD	2,773	1,941	334	498	0
27	19	Ecumen	MN	2,743	288	1,447	636	372
28	17	Christian Homes, Inc.	IL	2,635	544	283	1,681	127
29	NR	TELACU Residential Management	CA	2,625	0	0	0	2,625
30	22	Diakon Lutheran Social Ministries	PA	2,596	940	490	831	335
31	52	Presbyterian Villages of Michigan	MI	2,382	901	239	178	1,064
32	18	Presbyterian Manors of Mid-America, Inc.	KS	2,375	840	547	988	0
33	35	Hebrew SeniorLife	MA	2,359	660	119	814	766
34	20	Masonic Villages	PA	2,347	1,419	259	669	0
35	NR	Catholic Housing Management	FL	2,246	0	0	0	2,246
36	27	Augustana Care Corporation	MN	2,172	0	1,120	781	271
37	32	Jewish Home Lifecare	NY	2,133	21	0	1,630	482
38	NR	CARING Housing Ministries	CA	2,127	0	0	0	2,127
39	39	Episcopal Senior Communities	CA	2,114	1,013	99	376	626
40	66	Presbyterian SeniorCare	PA	2,113	348	351	415	999
41	26	Franciscan Communities, Inc.	IL	2,051	751	385	776	139
42	23	Shell Point	FL	2,037	1,332	377	328	0
43	29	Christian Care Companies	AZ	2,036	1,434	289	66	247
44	24	Willow Valley Communities	PA	2,026	1,530	219	277	0
45	NR	Christopher Homes	LA	1,860	0	0	0	1,860
46	28	Otterbein Senior Lifestyle Choices	OH	1,797	744	350	703	0
47	30	Senior Quality Lifestyles Corporation	TX	1,782	1,054	419	309	0
48	48	Greencroft Communities	IN	1,758	517	390	499	352
49	44	Mississippi Methodist Senior Services, Inc.	MS	1,755	807	315	320	313
50	31	Concordia Lutheran Ministries	PA	1,728	554	878	296	0

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

\*\* NR: No Rank. Not in the 2014 LZ 150 Primary Ranking

## 6-3 2014 LeadingAge Ziegler 150

### Additional Listings: Multi-site Senior Living Providers

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

Rank	2014 LZ 150 Rank	System Name	State	Units (as of 12/31/13)				
				Total	ILU	ALU	NCB	AFF
51	38	Providence Life Services	IL	1,714	665	360	528	161
52	NR	Catholic Charities Senior Communities	MD	1,705	0	0	0	1,705
53	68	Northern California Presbyterian Homes and Services, Inc.	CA	1,688	824	123	141	600
54	41	Loretto	NY	1,683	259	593	623	208
55	NR	Salvation Army Silvercrest Management of California	CA	1,678	0	0	0	1,678
56	33	Homewood Retirement Centers	MD	1,646	918	277	451	0
57	36	Elim Care, Inc.	MN	1,640	154	430	1,008	48
58	NR	Consegra Housing Network	IL	1,617	0	0	0	1,617
59	37	Eskaton	CA	1,586	533	606	426	21
60	NR	Satellite Housing	CA	1,586	0	0	0	1,586
61	59	Phoebe Ministries	PA	1,572	378	171	667	356
62	43	Presbyterian Homes	IL	1,551	859	224	363	105
63	40	Magnolia Manor	GA	1,483	339	335	809	0
64	41	Loretto	NY	1,475	259	593	623	0
65	42	Buckner Retirement Services, Inc.	TX	1,456	857	243	356	0
66	130	Christian Care Communities, Inc.	KY	1,436	185	0	468	783
67	45	WesleyLife	IA	1,431	694	299	438	0
68	46	Holland Home	MI	1,419	723	455	241	0
69	47	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	0
70	NR	Oklahoma City Housing Authority	OK	1,386	0	0	0	1,386
71	NR	Catholic Charities of Chicago	IL	1,372	0	0	0	1,372
72	49	Bethesda Health Group, Inc.	MO	1,369	549	18	802	0
73	50	Bethesda Senior Living Communities	CO	1,362	155	1,207	0	0
74	116	Lutheran Homes Society	OH	1,357	142	171	393	651
75	NR	Victory Housing	MD	1,347	0	0	0	1,347

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

\*\* NR: No Rank. Not in the 2014 LZ 150 Primary Ranking

## 6-3 2014 LeadingAge Ziegler 150

### Additional Listings: Multi-site Senior Living Providers

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

Rank	2014 LZ 150 Rank	System Name	State	Units (as of 12/31/13)				
				Total	ILU	ALU	NCB	AFF
76	72	United Methodist Homes of New Jersey	NJ	1,326	88	686	252	300
77	53	Baptist Village Communities	OK	1,280	774	181	325	0
78	54	Lutheran Life Communities	IL	1,279	233	299	747	0
79	55	Masonicare, Inc.	CT	1,266	458	272	536	0
80	56	Lutheran Services Carolinas	NC	1,262	257	273	732	0
81	57	Friendship Senior Options	IL	1,259	785	183	291	0
82	NR	New Samaritan Corp, Elderly Housing Management, Inc	CT	1,251	0	0	0	1,251
83	67	Sears Methodist Retirement System, Inc.	TX	1,246	529	136	432	149
84	65	Lutheran Social Services of South Central Pennsylvania	PA	1,245	553	251	334	107
85	58	SantaFe Senior Living	FL	1,228	876	252	100	0
86	63	Lutheran SeniorLife	PA	1,228	481	234	458	55
87	NR	Menorah Housing Foundation	CA	1,221	0	0	0	1,221
88	60	Virginia United Methodist Homes, Inc.	VA	1,213	516	424	273	0
89	61	Virginia Baptist Homes	VA	1,204	760	225	219	0
90	Second 25	Episcopal Retirement Homes, inc	OH	1,202	237	44	84	837
91	62	American Baptist Homes of the Midwest	MN	1,200	374	209	617	0
92	Second 25	Lutheran Social Services of Central Ohio	OH	1,179	126	48	125	880
93	123	Lutheran Social Ministries of New Jersey	NJ	1,176	281	130	267	498
94	NR	Lutheran Social Services of Illinois	IL	1,166	0	0	0	1,166
95	64	EMA	MD	1,156	651	228	277	0
96	73	Wesley Enhanced Living	PA	1,122	501	221	300	100
97	NR	Jewish Community Housing for the Elderly	MA	1,117	0	0	0	1,117
98	79	United Church Homes and Services	NC	1,098	530	74	344	150
99	105	Lutheran Social Services of Michigan	MI	1,097	281	120	356	340
100	NR	LSC Service Corp	OH	1,092	0	0	0	1,092

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

\*\* NR: No Rank. Not in the 2014 LZ 150 Primary Ranking

# LZ 150 Charts

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