

2017 LeadingAge 150 Ziegler



The nation's 150 largest not-for-profit senior living—

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

LeadingAge®

 Ziegler
CAPITAL :: INVESTMENTS :: ADVICE

Raising the Bar

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

Produced by:



LeadingAge members strive for innovation and excellence. 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, and 100s of businesses, consumer groups, foundations, and research partners. LeadingAge is also a part of the International Association of Homes and Services for the Aging (IAHSA), whose membership spans 30 countries. LeadingAge is a 501(c) (3) tax-exempt charitable organization focused on education, advocacy, and applied research.

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



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.

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

LeadingAge Ziegler 150. The nation's largest not-for-profit multi-site senior living organizations.
ISBN 1-930599-13-7

Inclusion in this publication does not indicate endorsement or support of a particular organization, product, or service by LeadingAge. Report Issued November 2017.

©2017 LeadingAge. All rights reserved.

©2017 Ziegler, a division of B. C. Ziegler and Company. All rights reserved.

Table of Contents

Welcome Letters	2-3	Staffing	47
Objective	5	Affiliation	47
Chapter 1		Affordable Housing	48
Understanding the LeadingAge Ziegler 150	7	Managed Units and Communities	48
The LZ 150 Development	8	Assisted and Skilled Composition	48
		Home and Community-Based Services (HCBS)	48
		Technology	49
Chapter 2		Joint Ventures	49
The Largest 150	9	Organizational Characteristics/Analysis of the Data	50
A Quantitative Listing	9	Chapter 5	
Methodology	10	Growth and Change	121
Key Findings	11	Pace of Growth: The Largest 25	121
		Aggregate Growth	121
Chapter 3		Future Growth Plans	122
Rankings	13	Type of Growth: Expansion, New Communities, Merger/Acquisition/Affiliation, Disposition	122
The LZ 150 Not-for-Profit Multi-Site		Chapter 6	
Senior Living Organization Rankings	13	Additional Listings	179
Primary Rankings	16	Single-Campus Senior Living Communities	181
		Large Individual Campuses	187
Chapter 4		Affordable Housing Providers	191
Analysis of the Data	43	Systems by Total Market-Rate and Affordable Units	195
Units	43	LZ 150 Charts	199
Communities	44		
System Headquarters	44		
Metropolitan Statistical Areas (MSAs)	44		
Classifications	45		
Corporate Name Changes	46		
Ratings	46		
Revenues	46		
Corporate Staff	47		
Accreditation	47		



LeadingAge is pleased to partner with Ziegler to bring you the 14th edition of the LeadingAge Ziegler 150 (“LZ 150”).

Since its inception in 2004, this publication has become an eagerly anticipated annual report of the largest, most complex not-for-profit senior living organizations. From the oldest to the newest -- the largest to the smallest -- each organization has a unique story that includes commitment, community support, stewardship, resilience, and a reputation for going above-and-beyond.

This year is no exception. Our 2017 report demonstrates the significant role that LeadingAge member not-for-profit organizations play in the aging services field. Today, LeadingAge members are creatively addressing complex challenges. Their governing boards and senior leaders are responsibly engaging in effective strategic planning to reposition, grow, change, partner, innovate, and venture into new service possibilities.

The following pages present a snapshot of the longstanding story of our members’ enlightened leadership, transformation, and good works. By telling their stories, these organizations are engaged in shared learning – offering their experiences and strategies to the entire field. At the same time, they are helping to increase public understanding of the long-term services and supports our sector provides.

While the LeadingAge Ziegler 150 is not designed to be a qualitative report, nor an endorsement of any specific organization, each organization ranking represents strong governance and powerful leadership committed to quality services and long-term success.

LeadingAge is committed to continually expanding the world of possibilities for our aging population. I thank you for your interest and on-going support of this report.

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

Katie Sloan
President and CEO

LeadingAge



We are excited to be a part of the LeadingAge Ziegler publication for the 14th time, compiling data from the largest not-for-profit senior living providers in the country. LeadingAge has been the ideal partner for this research initiative because its membership is exclusively not-for-profit senior living providers.

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

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

In fact, this report began with one senior living provider. As we analyzed how quickly and by what methods a multi-site organization grew, it became clear that a comprehensive study of the not-for-profit universe of senior living system providers would offer enormous value. Over time, the report expanded to also include the nation's largest government-subsidized housing multi-sites and single campuses.

For the first ten years, this report consisted of 100 of the largest not-for-profit providers in the country. Four years ago, in response to the growing industry, we expanded the list to include the 150 largest not-for-profit providers, representing more than 265,100 units across the entire country. In the coming years, we anticipate the continued evolution of this list, and an expansion to the largest 200 not-for-profit providers. We hope this will be helpful to everyone.

We would sincerely like to thank the teams at LeadingAge and Ziegler who make this publication possible.

We would also like to give a special thanks to all the providers who take the time to share their information and who embrace this publication year after year.

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

Lisa McCracken
Director, Senior Living Research & Development
Ziegler

LeadingAge 150 Ziegler

The LeadingAge Ziegler 150

The LeadingAge Ziegler 150 (“LZ 150”) began when two organizations recognized the need to examine and better understand the not-for-profit senior living sector: LeadingAge, the nation’s largest association of not-for-profit aging service providers in the country, and Ziegler, one of the nation’s leading underwriters of financing for not-for-profit senior living providers.¹

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

The 2017 LeadingAge Ziegler 150 lists the largest not-for-profit systems providing aging services through senior living in the United States, in order of total owned market-rate units, as of **December 31, 2016**.

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

¹2017 ranking data and amounts provided by Thomson Reuters as of 12/31/16.

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 in decision making and ongoing reinvestment of revenue back into the organizations. Many businesses begin with a question 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 practically everywhere in America—rural communities, suburban communities, micropolitan areas, metropolitan areas, and inner-city neighborhoods. Founded to address unmet social needs in the broader community, most not-for-profits have a common willingness to find a way to meet the needs of their communities. Not-for-profits seek to provide outreach programs that deal with the most pressing—and often changing—social issues of a diverse population, including older adults, at-risk children and families, and others who are facing challenges.

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

Many not-for-profit providers rose from modest beginnings more than a century ago into vital community resources today. In fact, listed in the LeadingAge Ziegler 150 rankings are nearly 50 organizations that were founded more than 100 years ago! These organizations continue to build legacies of caring, giving, and selflessness while expanding their capabilities and honing their skills -- striving to provide quality service for generations to come.

The LeadingAge Ziegler 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 collectively. Ziegler had a host of questions it wished to answer for itself, its clients, and those interested in investing in the senior living sector, such as who are the largest senior living providers in the nation, how quickly are systems growing, and what trends are taking place with the type of growth.

By assembling and presenting the combined data and knowledge of LeadingAge and Ziegler, the LZ 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 expand to serve a broader community, while other times 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 elderly community, both residential and home-based. Thousands of not-for-profit providers are playing an important role in the United States. We embrace each organization's contribution to the populations it serves. Regardless of an organization's size, not-for-profits are strong in numbers and bound by shared values.

Chapter 2

The Largest 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 are therefore not included in the total unit count compiled in the LZ 150 **Primary Ranking**. However, 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 an organization may consider itself a system if they own, for example, a nursing home on one side of the street with independent living units on the other; or an organization may have multiple community types nearby and may market these communities independently of one another. While these types of organizations—with properties contiguous or in close proximity—were not considered systems in the first publication (2004), upon reconsideration we began to include them in subsequent publications (e.g., Willow Valley Communities [PA]).

It should be noted that systems composed primarily of government-subsidized (affordable) housing have been intentionally excluded from the primary LZ 150 listing. Additional rankings of affordable housing providers are included in Chapter 6 of the report. In previous years, systems that were comprised primarily of acute or post-acute services or health care systems were also excluded. Beginning with the 2016 report, additional systems were included to reflect not-for-profit health systems that have a separate division, or ministry, with a distinct focus on operating as a senior living system. Examples of such a system are Ascension Senior Living and Trinity Senior Living Communities.

Compiling the Listing

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

For each organization, Ziegler attempted to trace its history of growth, starting with the date of inception. The pattern of growth for each system is created by recording the year in which change occurred—by expanding existing communities, building new communities, acquiring existing communities, or disposing of communities or units. Websites, 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 2017 LZ 150 were provided and confirmed (“confirmation”) by 132 of the 150 organizations. Thirty-three 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 majority of cases by the organizations themselves, some organizations cannot trace their histories to the degree of accuracy preferred for the LZ 150 analyses. In such cases, historical information has

been extrapolated and the current information validated. For those analyses where detail was unavailable, unit mix in prior years with uncertain histories was approximated based on the most recent current mix data. The LZ 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, value, or endorsement.

Key Findings

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

- **An understanding of size ...** The systems range from 19,051 units to 632 units.
- **Information on unit mix ...** The 10 largest providers of senior living represent approximately 30% of the total number of units for all systems in LZ 150.
- **An appreciation of the rate of growth ...** In the last 10 years, the average annual growth rate in total units is 3.1%, 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 60% 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. Most of the 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. Recent years have also seen an uptick in the number of organizations growing through affiliation or acquisition.
- **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). Of the LZ 150, approximately 54% offer some type of home and community-based services to non-residents. Gaining in popularity is the CCaH model, which is now offered by slightly more than 14% of the LZ 150.
- **A glimpse of the geography ...** The systems provide market-rate senior living in 47 states. Pennsylvania hosts the highest number of system headquarters in the LZ 150. Minnesota has the largest total number of communities, with 207.
- **Technology ...** On average, 84% of the communities owned by the LZ 150 use electronic point of care/point of service documentation systems. The same percentage, 84%, use electronic health/medical records. Adoption is generally lower for health and wellness technologies, such as medication monitoring or telehealth remote monitoring. A category added in 2016, care/case management and coordination, reveals that 62.7% of the LZ 150 use this software.
- **Joint Ventures and Partnerships ...** Slightly more than one-third 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. This is more than the 34% reported in the 2016 report. Four out of 10 of the providers also indicated that they are engaged in a formal health care reform contract, whether it be an Accountable Care Organization (ACO) or a bundled payment agreement. This figure has grown steadily over the past few years from roughly 25% in 2013 to 48% in 2016.

LeadingAge 150 Ziegler

Chapter 3

Rankings

The LZ 150 Not-for-profit Multi-site

Senior Living Organization Rankings

Data can be ‘cut and sliced’ across a variety of time periods: one year, five years, 10 years, or more. The growth of some LZ 150 organizations may be most dramatic across a five-year period; others may have more change across a 10-year period. Nearly every listing of this sort focuses first, however, on annual change. Therefore, the **Primary Ranking** (Chart 3-1a) of the LZ 150 is by total senior living units with the 2017 and 2016 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 2017 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations.

The 2017 Rank. The 2017 Rank column displays the numerical ranking of each system according to its 12/31/16 data within the LZ 150 for each of the four listings: 1) Total Senior Living Units, i.e., the **Primary Ranking** (Chart 3-1a); 2) Total Independent Living Units (Chart 3-1b); 3) Total Assisted Living Units (Chart 3-1c); and 4) Total Nursing Care Beds (Chart 3-1d). An organization’s ranking in each respective listing may change depending on the composition of its unit mix, that is, the mix of independent living units to assisted living units to nursing units within its system of communities.

The 2016 Rank. The 2016 Rank shows the numerical ranking of the listed organization in last year’s publication (according to its 12/31/15 data) listing of the same type. The organizations that show “NR” (Not Ranked) were not included in the LZ 150 rankings for 2016. Also note that with the increase to the largest 150 in the 2016 publication, the “Next 25” connotes a different meaning than in previous years when the rankings ended at 100. The “Next 50” in the current publication represent organizations ranked 151 through 200 as of 12/31/2016.

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 12/31/16). The systems listed in the 2017 LZ 150 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/16. Managed communities that are not owned are discussed later in the publication (Chapter 4) and are not included in the total community count compiled in the LZ 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. (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, and lawn maintenance.

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.

Many of the not-for-profit organizations have combined independent living, nursing and/or assisted living on one campus. These campuses are typically called continuing care retirement communities, or Life Plan Communities (LPCs) (described in more detail below). Most of the organizations in the LZ 150 have Life Plan Communities within their portfolios; however, for purposes of unit rankings, the units within Life Plan Communities are counted by level of care.

Communities (as of 12/31/16). Over the years, various terms have been used to describe a senior living property: site, location, facility, campus, and community. A high rise on a limited acreage parcel does not fit the term “campus.” A scattering of buildings, offering various levels of care, across extended acreage does not fit the term “facility.” We believe the best all-encompassing word to use is “community.” The communities examined are life plan communities (LPC), independent living communities (IL), assisted living communities (AL), and nursing homes (NH). It is important to note that a single Life Plan Community may include ILU (independent living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will contain at least independent living and nursing care. The Life Plan Community’s resident payment plans may include entrance fee, condo/co-op, and/or rental programs. Generally the majority of the Life Plan Community’s units are

not NCB. The systems listed in the LZ 150 are ranked by totaling the communities owned by the system in these four key areas: LPCs, IL, AL, and NH.

The Next 50. The LZ 150 stops at the 150th largest not-for-profit system, leaving numerous senior living systems just beyond the list's cut-off. The "Next 50" is a listing of the next 50 systems tracked by Ziegler and sorted alphabetically within groups of 25 determined by size.

LeadingAge 150 Ziegler

²The definition of Life Plan Communities (LPC) used by Ziegler in its 2009 *Ziegler National CCRC Listing & Profile* includes the qualifying factor that, at a minimum, a community must offer both independent living and nursing services. This may not be consistent with how organizations classify their communities for this LZ 150 research.

3-1 2017 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

2017 Rank	2016 Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses	MD	19,051	16,346	1,421	1,284	16	16	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	17,839	5,131	2,274	10,434	168	67	8	8	85
3	3	ACTS Retirement Services, Inc.	PA	7,862	5,529	901	1,432	21	21	0	0	0
4	4	Presbyterian Homes & Services	MN	7,135	3,632	2,201	1,302	43	13	23	4	3
5	5	Benedictine Health System	MN	5,270	625	1,484	3,161	39	24	1	5	9
6	6	Covenant Retirement Communities	IL	5,022	3,155	884	983	18	14	1	2	1
7	15	HumanGood fka Cornerstone (ABHOW & be.group)	CA	4,761	2,904	937	920	19	17	1	1	0
8	7	Ascension Senior Living	MO	4,624	937	833	2,854	27	8	2	2	15
9	10	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	4,198	1,341	640	2,217	22	6	4	1	11
10	8	Retirement Housing Foundation	CA	4,105	2,635	875	595	18	9	8	1	0
11	9	Lifespace Communities, Inc.	IA	4,069	3,066	174	829	12	12	0	0	0
12	11	The Kendal Corporation	PA	3,758	2,547	656	555	15	13	2	0	0
13	14	Lutheran Senior Services	MO	3,535	1,608	733	1,194	11	8	0	1	2
14	13	Presbyterian Senior Living	PA	3,527	1,846	547	1,134	20	12	6	2	0
15	18	Asbury Communities	MD	3,455	2,119	457	879	8	7	0	0	1
16	12	Presence Life Connections	IL	3,362	1,090	256	2,016	22	6	0	0	16
17	16	Westminster Communities of Florida	FL	3,270	2,049	470	751	9	9	0	0	0
18	NR	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
19	17	Ohio Living fka Ohio Presbyterian Retirement Services	OH	3,080	1,596	586	898	12	12	0	0	0
20	19	Pacific Retirement Services, Inc.	OR	2,856	2,116	333	407	9	8	1	0	0
21	20	Front Porch Communities and Services	CA	2,760	1,965	255	540	10	5	5	0	0
22	24	Volunteers of America	VA	2,435	591	746	1,098	25	4	3	9	9
23	22	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,433	1,496	253	684	5	3	1	0	1
24	23	Diakon Lutheran Social Ministries	PA	2,419	919	531	969	9	9	0	0	0
25	25	Ecumen	MN	2,354	376	1,452	526	32	0	5	20	7

NR: Not ranked in that year
fka: formerly known as

3-1 2017 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

2017 Rank	2016 Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	21	Presbyterian Manors of Mid-America, Inc.	KS	2,340	922	579	839	17	16	0	1	0
27	29	Springpoint Senior Living Inc.	NJ	2,279	1,649	279	351	7	7	0	0	0
28	26	Christian Homes, Inc.	MO	2,181	383	312	1,486	13	11	0	1	1
29	27	Shell Point Retirement Community	FL	2,110	1,384	398	328	2	2	0	0	0
30	31	Augustana Care	MN	2,102	269	921	912	22	0	0	15	7
31	36	Christian Care Companies	AZ	2,067	1,647	352	68	5	1	3	1	0
32	32	Otterbein Senior Lifestyle Choices	OH	2,037	786	382	869	14	6	0	0	8
33	28	Willow Valley Communities	PA	2,024	1,522	219	283	3	3	0	0	0
34	30	Franciscan Communities, Inc.	IL	1,950	738	438	774	8	4	1	3	0
35	33	Concordia Lutheran Ministries	PA	1,898	554	965	379	12	5	0	6	1
36	35	Senior Quality Lifestyle Corporation	TX	1,858	1,130	419	309	6	6	0	0	0
37	34	National Church Residences	OH	1,809	781	508	520	12	5	2	4	1
38	39	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
39	37	Greencroft Communities	IN	1,781	637	534	610	8	7	1	0	0
40	42	Providence Life Services	IL	1,713	725	360	628	9	1	4	1	3
41	40	Elim Care, Inc.	MN	1,697	197	452	1,048	24	0	4	9	11
42	41	Homewood Retirement Centers	MD	1,694	965	278	451	5	4	1	0	0
43	44	Bethesda Health Group, Inc.	MO	1,673	733	78	862	11	0	7	0	4
44	43	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	1,593	398	520	675	7	7	0	0	0
45	38	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
46	46	Episcopal Senior Communities	CA	1,587	1,074	137	376	6	6	0	0	0
47	51	Lutheran Life Communities	IL	1,576	408	407	761	6	6	0	0	0
48	135	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	1,575	1,050	463	62	11	2	6	3	0
49	49	Bethesda Senior Living Communities	CO	1,562	155	1,407	0	18	0	2	16	0
50	47	Loretto	NY	1,498	282	593	623	8	1	2	4	1

fka: formerly known as

LeadingAge 150 Ziegler

3-1 2017 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

2017 Rank	2016 Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	48	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
52	50	Covenant Health, Inc.	MA	1,476	0	364	1,112	12	0	0	4	8
53	54	WesleyLife	IA	1,440	681	311	448	7	7	0	0	0
54	56	Presbyterian Homes	IL	1,437	855	217	365	5	3	1	1	0
55	53	Mississippi Methodist Senior Services, Inc.	MS	1,434	776	338	320	12	2	8	0	2
56	55	Holland Home	MI	1,434	723	450	261	4	2	0	1	1
57	67	United Church Homes, Inc.	OH	1,375	326	275	774	10	6	1	0	3
58	60	Baptist Village Communities	OK	1,349	783	241	325	9	3	5	1	0
59	52	Buckner Retirement Services, Inc.	TX	1,322	723	273	326	5	5	0	0	0
60	64	Phoebe Ministries	PA	1,318	374	255	689	4	4	0	0	0
61	57	Eskaton	CA	1,315	195	694	426	13	1	1	8	3
62	59	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	3	0	0	0
63	61	Masonicare	CT	1,264	458	277	529	5	1	1	1	2
64	65	Lutheran Services Carolinas, Inc.	NC	1,243	257	254	732	9	1	1	1	6
65	63	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
66	62	Friendship Senior Options	IL	1,229	755	183	291	2	2	0	0	0
67	66	Virginia United Methodist Homes, Inc.	VA	1,226	513	433	280	7	6	0	1	0
68	69	SpiriTrust Lutheran	PA	1,218	553	321	344	6	6	0	0	0
69	68	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
70	104	Presbyterian Villages of Michigan	MI	1,189	915	184	90	9	1	7	1	0
71	71	BHI Senior Living, Inc.	IN	1,176	243	612	321	4	4	0	0	0
72	70	LifeSpire of Virginia fka Virginia Baptist Homes, Inc.	VA	1,174	738	219	217	4	4	0	0	0
73	72	Integrace	MD	1,139	634	228	277	4	3	0	1	0
74	74	Lutheran SeniorLife	PA	1,125	491	192	442	7	2	5	0	0
75	75	Lutheran Homes of South Carolina, Inc.	SC	1,073	405	308	360	5	5	0	0	0

fka: formerly known as

3-1 2017 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

2017 Rank	2016 Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	78	Eventide	MN	1,067	71	442	554	6	5	0	1	0
77	76	Northern California Presbyterian Homes & Services	CA	1,062	818	103	141	4	3	1	0	0
78	77	United Methodist Homes	NY	1,057	360	271	426	4	3	0	1	0
79	79	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
80	80	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	1,024	88	684	252	5	1	0	4	0
81	82	Blue Skies of Texas	TX	996	740	129	127	2	2	0	0	0
82	81	Elant	NY	995	148	144	703	6	1	0	1	4
83	83	Methodist Retirement Communities	TX	973	432	288	253	5	4	0	1	0
84	84	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	0	3	0	0
85	85	United Church Homes and Services	NC	956	538	90	328	3	3	0	0	0
86	127	Saint Therese	MN	946	402	134	410	5	3	0	1	1
87	87	The United Methodist Retirement Homes, Inc.	NC	932	622	108	202	3	3	0	0	0
88	86	Presby's Inspired Life	PA	925	472	199	254	4	2	0	1	1
89	88	Menno Haven	PA	920	531	177	212	3	2	1	0	0
90	94	Oakwood Lutheran Senior Ministries	WI	917	620	160	137	2	2	0	0	0
91	89	Vista Prairie Communities	MN	917	100	817	0	10	0	0	10	0
92	90	Liberty Lutheran Services	PA	904	373	314	217	4	3	0	1	0
93	95	Presbyterian Communities of South Carolina	SC	894	297	313	284	5	5	0	0	0
94	91	Morningside Ministries	TX	890	385	182	323	3	3	0	0	0
95	92	VMP	WI	889	447	205	237	2	2	0	0	0
96	93	Ingleside fka Westminster Ingleside Retirement Communities	DC	885	607	113	165	3	3	0	0	0
97	98	St. Ann's Community	NY	863	246	195	422	2	2	0	0	0
98	99	Living Branches	PA	850	461	246	143	3	2	0	1	0
99	100	Sun Health Senior Living, LLC	AZ	845	637	61	147	3	3	0	0	0
100	109	Western Home Communities	IA	843	473	238	132	3	1	2	0	0

fka: formerly known as



3-1 2017 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

2017 Rank	2016 Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	101	Presbyterian Communities and Services	TX	843	329	134	380	2	2	0	0	0
102	106	Givens Estates	NC	841	620	91	130	2	2	0	0	0
103	NR	Carroll Lutheran Village/The Lutheran Village at Miller's Grant	MD	838	637	86	115	2	2	0	0	0
104	45	The New Jewish Home fka Jewish Home Lifecare	NY	838	24	0	814	3	0	1	0	2
105	116	Christian Care Centers, Inc.	TX	837	408	206	223	3	3	0	0	0
106	96	Cedar Community	WI	832	414	233	185	6	1	2	2	1
107	103	Goodwin House Incorporated	VA	831	582	100	149	2	2	0	0	0
108	105	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
109	122	National Lutheran Inc. fka National Lutheran Home for the Aged	MD	818	518	120	180	3	2	1	0	0
110	117	Christian Living Communities	CO	818	417	223	178	4	3	0	1	0
111	107	LutherCare	PA	811	474	126	211	3	2	0	0	1
112	102	Simpson Senior Services	PA	809	454	170	185	3	3	0	0	0
113	NR	Haverland Carter Lifestyle Group	NM	794	414	282	98	3	2	0	1	0
114	119	Mather LifeWays	IL	792	665	56	71	3	2	1	0	0
115	108	Heritage Ministries	NY	785	243	122	420	9	1	3	2	3
116	110	The Ohio Masonic Home	OH	781	338	249	194	3	2	1	0	0
117	120	Wellspring Lutheran Services	MI	781	128	224	429	11	1	3	2	5
118	133	Lutheran Social Ministries of New Jersey, Inc.	NJ	779	281	150	348	3	1	0	0	2
119	112	Samaritas fka Lutheran Social Services of Michigan	MI	770	294	120	356	5	1	2	0	2
120	NR	Grace Inspired Ministries fka Lutheran Community at Telford & Rockhill Mennonite	PA	767	451	151	165	2	2	0	0	0
121	NR	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
122	NR	Wesley Willows	IL	764	503	170	91	2	1	1	0	0
123	73	United Methodist Memorial Home	IN	764	188	255	321	3	3	0	0	0
124	111	Sunnyside Presbyterian Home	VA	762	499	129	134	3	3	0	0	0
125	115	Garden Spot Communities fka Garden Spot Village	PA	747	542	86	119	2	1	0	0	1

NR: Not ranked in that year
fka: Formerly known as

3-1 2017 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

2017 Rank	2016 Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	118	Landis Communities	PA	745	493	149	103	3	1	1	0	1
127	113	Life Enriching Communities	OH	743	462	137	144	2	2	0	0	0
128	NR	Amsterdam Continuing Care Health System, Inc.	NY	741	226	50	465	2	1	0	0	1
129	Next 50	The RiverWoods Group	NH	734	523	124	87	2	2	0	0	0
130	121	Luther Manor	WI	732	366	156	210	2	1	0	1	0
131	124	Methodist ElderCare Services fka Methodist ElderCare	OH	726	337	283	106	3	1	2	0	0
132	130	Wesley Homes	WA	707	433	90	184	2	2	0	0	0
133	123	Genacross Lutheran Services fka Lutheran Homes Society	OH	706	142	171	393	5	2	1	0	2
134	126	Sunset Retirement Communities and Services	MI	698	304	225	169	4	2	0	1	1
135	128	Messiah Lifeways	PA	688	353	157	178	2	1	1	0	0
136	136	Maple Knoll Communities, Inc.	OH	683	385	91	207	2	2	0	0	0
137	131	Christian Health Care Center	NJ	681	297	92	292	2	1	1	0	0
138	121	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
139	134	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
140	150	St. John's Lutheran Ministries	MT	671	196	289	186	5	4	0	1	0
141	137	LifeStream Complete Senior Living, Inc.	AZ	665	357	148	160	4	1	2	0	1
142	148	Moorings Park	FL	662	480	76	106	2	2	0	0	0
143	168	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
144	141	Masonic Homes of Kentucky	KY	654	258	153	243	3	1	1	0	1
145	138	Albright Care Services	PA	653	285	79	289	2	2	0	0	0
146	139	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	652	334	135	183	4	2	1	0	1
147	129	Episcopal SeniorLife Communities	NY	650	337	131	182	9	1	4	3	1
148	132	LindenGrove Communities fka LindenGrove, Inc.	WI	650	0	189	461	4	0	0	0	4
149	142	The Loomis Communities	MA	633	427	72	134	4	4	0	0	0
150	NR	Bethany St. Joseph Corporation	WI	632	152	158	322	13	0	4	5	4

NR: Not ranked in that year
fka: Formerly known as

LeadingAge 150 Ziegler

3-1 2017 LeadingAge Ziegler 150

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

2017 IL Rank	2016 IL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses	MD	19,051	16,346	1,421	1,284	16	16	0	0	0
2	3	ACTS Retirement Services, Inc.	PA	7,862	5,529	901	1,432	21	21	0	0	0
3	2	The Evangelical Lutheran Good Samaritan Society	SD	17,839	5,131	2,274	10,434	168	67	8	8	85
4	4	Presbyterian Homes & Services	MN	7,135	3,632	2,201	1,302	43	13	23	4	3
5	5	Covenant Retirement Communities	IL	5,022	3,155	884	983	18	14	1	2	1
6	7	Lifespace Communities, Inc.	IA	4,069	3,066	174	829	12	12	0	0	0
7	11	HumanGood fka Cornerstone (ABHOW & be.group)	CA	4,761	2,904	937	920	19	17	1	1	0
8	6	Retirement Housing Foundation	CA	4,105	2,635	875	595	18	9	8	1	0
9	8	The Kendal Corporation	PA	3,758	2,547	656	555	15	13	2	0	0
10	12	Asbury Communities	MD	3,455	2,119	457	879	8	7	0	0	1
11	9	Pacific Retirement Services, Inc.	OR	2,856	2,116	333	407	9	8	1	0	0
12	10	Westminster Communities of Florida	FL	3,270	2,049	470	751	9	9	0	0	0
13	13	Front Porch Communities and Services	CA	2,760	1,965	255	540	10	5	5	0	0
14	14	Presbyterian Senior Living	PA	3,527	1,846	547	1,134	20	12	6	2	0
15	20	Springpoint Senior Living Inc.	NJ	2,279	1,649	279	351	7	7	0	0	0
16	19	Christian Care Companies	AZ	2,067	1,647	352	68	5	1	3	1	0
17	16	Lutheran Senior Services	MO	3,535	1,608	733	1,194	11	8	0	1	2
18	15	Ohio Living fka Ohio Presbyterian Retirement Services	OH	3,080	1,596	586	898	12	12	0	0	0
19	17	Willow Valley Communities	PA	2,024	1,522	219	283	3	3	0	0	0
20	18	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,433	1,496	253	684	5	3	1	0	1
21	21	Shell Point Retirement Community	FL	2,110	1,384	398	328	2	2	0	0	0
22	23	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	4,198	1,341	640	2,217	22	6	4	1	11
23	24	Senior Quality Lifestyle Corporation	TX	1,858	1,130	419	309	6	6	0	0	0
24	26	Presence Life Connections	IL	3,362	1,090	256	2,016	22	6	0	0	16
25	25	Episcopal Senior Communities	CA	1,587	1,074	137	376	6	6	0	0	0

fka: Formerly known as

3-1 2017 LeadingAge Ziegler 150

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

2017 IL Rank	2016 IL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	76	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	1,575	1,050	463	62	11	2	6	3	0
27	27	Homewood Retirement Centers	MD	1,694	965	278	451	5	4	1	0	0
28	29	Ascension Senior Living	MO	4,624	937	833	2,854	27	8	2	2	15
29	28	Presbyterian Manors of Mid-America, Inc.	KS	2,340	922	579	839	17	16	0	1	0
30	30	Diakon Lutheran Social Ministries	PA	2,419	919	531	969	9	9	0	0	0
31	63	Presbyterian Villages of Michigan	MI	1,189	915	184	90	9	1	7	1	0
32	31	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	3	0	0	0
33	34	Presbyterian Homes	IL	1,437	855	217	365	5	3	1	1	0
34	35	Northern California Presbyterian Homes & Services	CA	1,062	818	103	141	4	3	1	0	0
35	43	Otterbein Senior Lifestyle Choices	OH	2,037	786	382	869	14	6	0	0	8
36	37	Baptist Village Communities	OK	1,349	783	241	325	9	3	5	1	0
37	36	National Church Residences	OH	1,809	781	508	520	12	5	2	4	1
38	38	Mississippi Methodist Senior Services, Inc.	MS	1,434	776	338	320	12	2	8	0	2
39	39	Friendship Senior Options	IL	1,229	755	183	291	2	2	0	0	0
40	42	Blue Skies of Texas	TX	996	740	129	127	2	2	0	0	0
41	41	Franciscan Communities, Inc.	IL	1,950	738	438	774	8	4	1	3	0
42	40	LifeSpire of Virginia fka Virginia Baptist Homes, Inc.	VA	1,174	738	219	217	4	4	0	0	0
43	45	Bethesda Health Group, Inc.	MO	1,673	733	78	862	11	0	7	0	4
44	47	Providence Life Services	IL	1,713	725	360	628	9	1	4	1	3
45	44	Holland Home	MI	1,434	723	450	261	4	2	0	1	1
46	32	Buckner Retirement Services, Inc.	TX	1,322	723	273	326	5	5	0	0	0
47	46	WesleyLife	IA	1,440	681	311	448	7	7	0	0	0
48	55	Mather LifeWays	IL	792	665	56	71	3	2	1	0	0
49	48	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
50	51	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	0	3	0	0

fka: Formerly known as



3-1 2017 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2017 IL Rank	2016 IL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	52	Greencroft Communities	IN	1,781	637	534	610	8	7	1	0	0
52	50	Sun Health Senior Living, LLC	AZ	845	637	61	147	3	3	0	0	0
53	NR	Carroll Lutheran Village/The Lutheran Village at Miller's Grant	MD	838	637	86	115	2	2	0	0	0
54	63	Integrace	MD	1,139	634	228	277	4	3	0	1	0
55	53	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
56	54	Benedictine Health System	MN	5,270	625	1,484	3,161	39	24	1	5	9
57	56	The United Methodist Retirement Homes, Inc.	NC	932	622	108	202	3	3	0	0	0
58	59	Oakwood Lutheran Senior Ministries	WI	917	620	160	137	2	2	0	0	0
59	58	Givens Estates	NC	841	620	91	130	2	2	0	0	0
60	57	Ingleside fka Westminster Ingleside Retirement Communities	DC	885	607	113	165	3	3	0	0	0
61	66	Volunteers of America	VA	2,435	591	746	1,098	25	4	3	9	9
62	60	Goodwin House Incorporated	VA	831	582	100	149	2	2	0	0	0
63	61	Concordia Lutheran Ministries	PA	1,898	554	965	379	12	5	0	6	1
64	62	SpiriTrust Lutheran	PA	1,218	553	321	344	6	6	0	0	0
65	64	Garden Spot Communities fka Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
66	65	United Church Homes and Services	NC	956	538	90	328	3	3	0	0	0
67	67	Menno Haven	PA	920	531	177	212	3	2	1	0	0
68	Next 50	The RiverWoods Group	NH	734	523	124	87	2	2	0	0	0
69	87	National Lutheran Inc. fka National Lutheran Home for the Aged	MD	818	518	120	180	3	2	1	0	0
70	68	Virginia United Methodist Homes, Inc.	VA	1,226	513	433	280	7	6	0	1	0
71	73	Wesley Willows	IL	764	503	170	91	2	1	1	0	0
72	69	Sunnyside Presbyterian Home	VA	762	499	129	134	3	3	0	0	0
73	71	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
74	72	Landis Communities	PA	745	493	149	103	3	1	1	0	1
75	77	Lutheran SeniorLife	PA	1,125	491	192	442	7	2	5	0	0

NR: Not ranked in that year
fka: Formerly known as

3-1 2017 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2017 IL Rank	2016 IL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	88	Moorings Park	FL	662	480	76	106	2	2	0	0	0
77	75	LutherCare	PA	811	474	126	211	3	2	0	0	1
78	85	Western Home Communities	IA	843	473	238	132	3	1	2	0	0
79	74	Presby's Inspired Life	PA	925	472	199	254	4	2	0	1	1
80	78	Life Enriching Communities	OH	743	462	137	144	2	2	0	0	0
81	79	Living Branches	PA	850	461	246	143	3	2	0	1	0
82	80	Masonicare	CT	1,264	458	277	529	5	1	1	1	2
83	70	Simpson Senior Services	PA	809	454	170	185	3	3	0	0	0
84	NR	Grace Inspired Ministries fka Lutheran Community at Telford & Rockhill Mennonite	PA	767	451	151	165	2	2	0	0	0
85	82	VMP	WI	889	447	205	237	2	2	0	0	0
86	81	Wesley Homes	WA	707	433	90	184	2	2	0	0	0
87	83	Methodist Retirement Communities	TX	973	432	288	253	5	4	0	1	0
88	84	The Loomis Communities	MA	633	427	72	134	4	4	0	0	0
89	89	Christian Living Communities	CO	818	417	223	178	4	3	0	1	0
90	86	Cedar Community	WI	832	414	233	185	6	1	2	2	1
91	NR	Haverland Carter Lifestyle Group	NM	794	414	282	98	3	2	0	1	0
92	90	Lutheran Life Communities	IL	1,576	408	407	761	6	6	0	0	0
93	94	Christian Care Centers, Inc.	TX	837	408	206	223	3	3	0	0	0
94	91	Lutheran Homes of South Carolina, Inc.	SC	1,073	405	308	360	5	5	0	0	0
95	118	Saint Therese	MN	946	402	134	410	5	3	0	1	1
96	92	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	1,593	398	520	675	7	7	0	0	0
97	95	Morningside Ministries	TX	890	385	182	323	3	3	0	0	0
98	102	Maple Knoll Communities, Inc.	OH	683	385	91	207	2	2	0	0	0
99	93	Christian Homes, Inc.	MO	2,181	383	312	1,486	13	11	0	1	1
100	97	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0

NR: Not ranked in that year
fka: Formerly known as

LeadingAge 150 Ziegler

3-1 2017 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2017 IL Rank	2016 IL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	121	Ecumen	MN	2,354	376	1,452	526	32	0	5	20	7
102	100	Phoebe Ministries	PA	1,318	374	255	689	4	4	0	0	0
103	101	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
104	96	Liberty Lutheran Services	PA	904	373	314	217	4	3	0	1	0
105	104	Luther Manor	WI	732	366	156	210	2	1	0	1	0
106	103	United Methodist Homes	NY	1,057	360	271	426	4	3	0	1	0
107	105	LifeStream Complete Senior Living, Inc.	AZ	665	357	148	160	4	1	2	0	1
108	106	Messiah Lifeways	PA	688	353	157	178	2	1	1	0	0
109	108	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
110	109	The Ohio Masonic Home	OH	781	338	249	194	3	2	1	0	0
111	110	Methodist ElderCare Services fka Methodist ElderCare	OH	726	337	283	106	3	1	2	0	0
112	98	Episcopal SeniorLife Communities	NY	650	337	131	182	9	1	4	3	1
113	112	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	652	334	135	183	4	2	1	0	1
114	113	Presbyterian Communities and Services	TX	843	329	134	380	2	2	0	0	0
115	116	United Church Homes, Inc.	OH	1,375	326	275	774	10	6	1	0	3
116	117	Sunset Retirement Communities and Services	MI	698	304	225	169	4	2	0	1	1
117	123	Presbyterian Communities of South Carolina	SC	894	297	313	284	5	5	0	0	0
118	119	Christian Health Care Center	NJ	681	297	92	292	2	1	1	0	0
119	120	Samaritas fka Lutheran Social Services of Michigan	MI	770	294	120	356	5	1	2	0	2
120	125	Albright Care Services	PA	653	285	79	289	2	2	0	0	0
121	122	Loretto	NY	1,498	282	593	623	8	1	2	4	1
122	124	Lutheran Social Ministries of New Jersey, Inc.	NJ	779	281	150	348	3	1	0	0	2
123	148	Augustana Care	MN	2,102	269	921	912	22	0	0	15	7
124	NR	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
125	130	Masonic Homes of Kentucky	KY	654	258	153	243	3	1	1	0	1

NR: Not ranked in that year
fka: Formerly known as

3-1 2017 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2017 IL Rank	2016 IL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	132	Lutheran Services Carolinas, Inc.	NC	1,243	257	254	732	9	1	1	1	6
127	131	St. Ann's Community	NY	863	246	195	422	2	2	0	0	0
128	128	BHI Senior Living, Inc.	IN	1,176	243	612	321	4	4	0	0	0
129	129	Heritage Ministries	NY	785	243	122	420	9	1	3	2	3
130	NR	Amsterdam Continuing Care Health System, Inc.	NY	741	226	50	465	2	1	0	0	1
131	133	Elim Care, Inc.	MN	1,697	197	452	1,048	24	0	4	9	11
132	138	St. John's Lutheran Ministries	MT	671	196	289	186	5	4	0	1	0
133	111	Eskaton	CA	1,315	195	694	426	13	1	1	8	3
134	127	United Methodist Memorial Home	IN	764	188	255	321	3	3	0	0	0
135	135	Bethesda Senior Living Communities	CO	1,562	155	1,407	0	18	0	2	16	0
136	NR	Bethany St. Joseph Corporation	WI	632	152	158	322	13	0	4	5	4
137	137	Elant	NY	995	148	144	703	6	1	0	1	4
138	NR	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
139	139	Genacross Lutheran Services fka Lutheran Homes Society	OH	706	142	171	393	5	2	1	0	2
140	Next 50	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
141	140	Wellspring Lutheran Services	MI	781	128	224	429	11	1	3	2	5
142	141	Vista Prairie Communities	MN	917	100	817	0	10	0	0	10	0
143	143	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	1,024	88	684	252	5	1	0	4	0
144	144	Eventide	MN	1,067	71	442	554	6	5	0	1	0
145	145	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
146	147	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
147	147	The New Jewish Home fka Jewish Home Lifecare	NY	838	24	0	814	3	0	1	0	2
148	22	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
149	149	Covenant Health, Inc.	MA	1,476	0	364	1,112	12	0	0	4	8
150	150	LindenGrove Communities fka LindenGrove, Inc.	WI	650	0	189	461	4	0	0	0	4

NR: Not ranked in that year
fka: Formerly known as

LeadingAge 150 Ziegler

3-1 2017 LeadingAge Ziegler 150

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

3-1c RANKED BY ASSISTED LIVING UNITS

2017 AL Rank	2016 AL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	The Evangelical Lutheran Good Samaritan Society	SD	17,839	5,131	2,274	10,434	168	67	8	8	85
2	2	Presbyterian Homes & Services	MN	7,135	3,632	2,201	1,302	43	13	23	4	3
3	3	Benedictine Health System	MN	5,270	625	1,484	3,161	39	24	1	5	9
4	4	Ecumen	MN	2,354	376	1,452	526	32	0	5	20	7
5	5	National Senior Campuses	MD	19,051	16,346	1,421	1,284	16	16	0	0	0
6	6	Bethesda Senior Living Communities	CO	1,562	155	1,407	0	18	0	2	16	0
7	8	Concordia Lutheran Ministries	PA	1,898	554	965	379	12	5	0	6	1
8	19	HumanGood fka Cornerstone (ABHOW & be.group)	CA	4,761	2,904	937	920	19	17	1	1	0
9	7	Augustana Care	MN	2,102	269	921	912	22	0	0	15	7
10	9	ACTS Retirement Services, Inc.	PA	7,862	5,529	901	1,432	21	21	0	0	0
11	10	Covenant Retirement Communities	IL	5,022	3,155	884	983	18	14	1	2	1
12	11	Retirement Housing Foundation	CA	4,105	2,635	875	595	18	9	8	1	0
13	12	Ascension Senior Living	MO	4,624	937	833	2,854	27	8	2	2	15
14	13	Vista Prairie Communities	MN	917	100	817	0	10	0	0	10	0
15	14	Volunteers of America	VA	2,435	591	746	1,098	25	4	3	9	9
16	15	Lutheran Senior Services	MO	3,535	1,608	733	1,194	11	8	0	1	2
17	18	Eskaton	CA	1,315	195	694	426	13	1	1	8	3
18	16	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	1,024	88	684	252	5	1	0	4	0
19	17	The Kendal Corporation	PA	3,758	2,547	656	555	15	13	2	0	0
20	20	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	4,198	1,341	640	2,217	22	6	4	1	11
21	21	BHI Senior Living, Inc.	IN	1,176	243	612	321	4	4	0	0	0
22	22	Loretto	NY	1,498	282	593	623	8	1	2	4	1
23	24	Ohio Living fka Ohio Presbyterian Retirement Services	OH	3,080	1,596	586	898	12	12	0	0	0
24	23	Presbyterian Manors of Mid-America, Inc.	KS	2,340	922	579	839	17	16	0	1	0
25	30	Presbyterian Senior Living	PA	3,527	1,846	547	1,134	20	12	6	2	0

fka: Formerly known as

3-1 2017 LeadingAge Ziegler 150

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

2017 AL Rank	2016 AL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	26	Greencroft Communities	IN	1,781	637	534	610	8	7	1	0	0
27	27	Diakon Lutheran Social Ministries	PA	2,419	919	531	969	9	9	0	0	0
28	28	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	1,593	398	520	675	7	7	0	0	0
29	25	National Church Residences	OH	1,809	781	508	520	12	5	2	4	1
30	31	Westminster Communities of Florida	FL	3,270	2,049	470	751	9	9	0	0	0
31	Next 50	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
32	116	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	1,575	1,050	463	62	11	2	6	3	0
33	48	Asbury Communities	MD	3,455	2,119	457	879	8	7	0	0	1
34	32	Elim Care, Inc.	MN	1,697	197	452	1,048	24	0	4	9	11
35	33	Holland Home	MI	1,434	723	450	261	4	2	0	1	1
36	38	Eventide	MN	1,067	71	442	554	6	5	0	1	0
37	34	Franciscan Communities, Inc.	IL	1,950	738	438	774	8	4	1	3	0
38	35	Virginia United Methodist Homes, Inc.	VA	1,226	513	433	280	7	6	0	1	0
39	NR	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
40	36	Senior Quality Lifestyle Corporation	TX	1,858	1,130	419	309	6	6	0	0	0
41	41	Lutheran Life Communities	IL	1,576	408	407	761	6	6	0	0	0
42	39	Shell Point Retirement Community	FL	2,110	1,384	398	328	2	2	0	0	0
43	40	Otterbein Senior Lifestyle Choices	OH	2,037	786	382	869	14	6	0	0	8
44	44	Covenant Health, Inc.	MA	1,476	0	364	1,112	12	0	0	4	8
45	45	Providence Life Services	IL	1,713	725	360	628	9	1	4	1	3
46	47	Christian Care Companies	AZ	2,067	1,647	352	68	5	1	3	1	0
47	46	Mississippi Methodist Senior Services, Inc.	MS	1,434	776	338	320	12	2	8	0	2
48	49	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
49	50	Pacific Retirement Services, Inc.	OR	2,856	2,116	333	407	9	8	1	0	0
50	54	SpiriTrust Lutheran	PA	1,218	553	321	344	6	6	0	0	0

NR: Not ranked in that year
fka: Formerly known as

3-1 2017 LeadingAge Ziegler 150

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

3-1c RANKED BY ASSISTED LIVING UNITS

2017 AL Rank	2016 AL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	51	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	3	0	0	0
52	56	Liberty Lutheran Services	PA	904	373	314	217	4	3	0	1	0
53	52	Presbyterian Communities of South Carolina	SC	894	297	313	284	5	5	0	0	0
54	73	Christian Homes, Inc.	MO	2,181	383	312	1,486	13	11	0	1	1
55	55	WesleyLife	IA	1,440	681	311	448	7	7	0	0	0
56	53	Lutheran Homes of South Carolina, Inc.	SC	1,073	405	308	360	5	5	0	0	0
57	65	St. John's Lutheran Ministries	MT	671	196	289	186	5	4	0	1	0
58	57	Methodist Retirement Communities	TX	973	432	288	253	5	4	0	1	0
59	66	Methodist ElderCare Services fka Methodist ElderCare	OH	726	337	283	106	3	1	2	0	0
60	NR	Haverland Carter Lifestyle Group	NM	794	414	282	98	3	2	0	1	0
61	60	Springpoint Senior Living Inc.	NJ	2,279	1,649	279	351	7	7	0	0	0
62	58	Homewood Retirement Centers	MD	1,694	965	278	451	5	4	1	0	0
63	59	Masonicare	CT	1,264	458	277	529	5	1	1	1	2
64	86	United Church Homes, Inc.	OH	1,375	326	275	774	10	6	1	0	3
65	63	Buckner Retirement Services, Inc.	TX	1,322	723	273	326	5	5	0	0	0
66	64	United Methodist Homes	NY	1,057	360	271	426	4	3	0	1	0
67	61	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
68	42	Presence Life Connections	IL	3,362	1,090	256	2,016	22	6	0	0	16
69	43	Front Porch Communities and Services	CA	2,760	1,965	255	540	10	5	5	0	0
70	93	Phoebe Ministries	PA	1,318	374	255	689	4	4	0	0	0
71	29	United Methodist Memorial Home	IN	764	188	255	321	3	3	0	0	0
72	68	Lutheran Services Carolinas, Inc.	NC	1,243	257	254	732	9	1	1	1	6
73	67	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,433	1,496	253	684	5	3	1	0	1
74	69	The Ohio Masonic Home	OH	781	338	249	194	3	2	1	0	0
75	70	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0

NR: Not ranked in that year
fka: Formerly known as

3-1 2017 LeadingAge Ziegler 150

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

2017 AL Rank	2016 AL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	71	Living Branches	PA	850	461	246	143	3	2	0	1	0
77	91	Baptist Village Communities	OK	1,349	783	241	325	9	3	5	1	0
78	75	Western Home Communities	IA	843	473	238	132	3	1	2	0	0
79	74	Cedar Community	WI	832	414	233	185	6	1	2	2	1
80	76	Integrace	MD	1,139	634	228	277	4	3	0	1	0
81	77	Sunset Retirement Communities and Services	MI	698	304	225	169	4	2	0	1	1
82	78	Wellspring Lutheran Services	MI	781	128	224	429	11	1	3	2	5
83	103	Christian Living Communities	CO	818	417	223	178	4	3	0	1	0
84	79	Willow Valley Communities	PA	2,024	1,522	219	283	3	3	0	0	0
85	80	LifeSpire of Virginia fka Virginia Baptist Homes, Inc.	VA	1,174	738	219	217	4	4	0	0	0
86	81	Presbyterian Homes	IL	1,437	855	217	365	5	3	1	1	0
87	82	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
88	110	Christian Care Centers, Inc.	TX	837	408	206	223	3	3	0	0	0
89	84	VMP	WI	889	447	205	237	2	2	0	0	0
90	83	Presby's Inspired Life	PA	925	472	199	254	4	2	0	1	1
91	143	St. Ann's Community	NY	863	246	195	422	2	2	0	0	0
92	87	Lutheran SeniorLife	PA	1,125	491	192	442	7	2	5	0	0
93	88	LindenGrove Communities fka LindenGrove, Inc.	WI	650	0	189	461	4	0	0	0	4
94	85	Presbyterian Villages of Michigan	MI	1,189	915	184	90	9	1	7	1	0
95	89	Friendship Senior Options	IL	1,229	755	183	291	2	2	0	0	0
96	90	Morningside Ministries	TX	890	385	182	323	3	3	0	0	0
97	92	Menno Haven	PA	920	531	177	212	3	2	1	0	0
98	101	Lifespace Communities, Inc.	IA	4,069	3,066	174	829	12	12	0	0	0
99	94	Genacross Lutheran Services fka Lutheran Homes Society	OH	706	142	171	393	5	2	1	0	2
100	95	Wesley Willows	IL	764	503	170	91	2	1	1	0	0

fka: Formerly known as



3-1 2017 LeadingAge Ziegler 150

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

3-1c RANKED BY ASSISTED LIVING UNITS

2017 AL Rank	2016 AL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	102	Simpson Senior Services	PA	809	454	170	185	3	3	0	0	0
102	96	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
103	97	Oakwood Lutheran Senior Ministries	WI	917	620	160	137	2	2	0	0	0
104	NR	Bethany St. Joseph Corporation	WI	632	152	158	322	13	0	4	5	4
105	99	Messiah Lifeways	PA	688	353	157	178	2	1	1	0	0
106	100	Luther Manor	WI	732	366	156	210	2	1	0	1	0
107	105	Masonic Homes of Kentucky	KY	654	258	153	243	3	1	1	0	1
108	NR	Grace Inspired Ministries fka Lutheran Community at Telford & Rockhill Mennonite	PA	767	451	151	165	2	2	0	0	0
109	119	Lutheran Social Ministries of New Jersey, Inc.	NJ	779	281	150	348	3	1	0	0	2
110	104	Landis Communities	PA	745	493	149	103	3	1	1	0	1
111	107	LifeStream Complete Senior Living, Inc.	AZ	665	357	148	160	4	1	2	0	1
112	106	Elant	NY	995	148	144	703	6	1	0	1	4
113	124	Episcopal Senior Communities	CA	1,587	1,074	137	376	6	6	0	0	0
114	112	Life Enriching Communities	OH	743	462	137	144	2	2	0	0	0
115	113	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	652	334	135	183	4	2	1	0	1
116	141	Saint Therese	MN	946	402	134	410	5	3	0	1	1
117	114	Presbyterian Communities and Services	TX	843	329	134	380	2	2	0	0	0
118	115	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	0	3	0	0
119	118	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
120	117	Episcopal SeniorLife Communities	NY	650	337	131	182	9	1	4	3	1
121	120	Blue Skies of Texas	TX	996	740	129	127	2	2	0	0	0
122	121	Sunnyside Presbyterian Home	VA	762	499	129	134	3	3	0	0	0
123	122	LutherCare	PA	811	474	126	211	3	2	0	0	1
124	Next 50	The RiverWoods Group	NH	734	523	124	87	2	2	0	0	0
125	NR	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0

NR: Not ranked in that year
fka: Formerly known as

3-1 2017 LeadingAge Ziegler 150

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

2017 AL Rank	2016 AL Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	123	Heritage Ministries	NY	785	243	122	420	9	1	3	2	3
127	126	National Lutheran Inc. fka National Lutheran Home for the Aged	MD	818	518	120	180	3	2	1	0	0
128	125	Samaritas fka Lutheran Social Services of Michigan	MI	770	294	120	356	5	1	2	0	2
129	98	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
130	128	Ingleside fka Westminster Ingleside Retirement Communities	DC	885	607	113	165	3	3	0	0	0
131	129	The United Methodist Retirement Homes, Inc.	NC	932	622	108	202	3	3	0	0	0
132	130	Northern California Presbyterian Homes & Services	CA	1,062	818	103	141	4	3	1	0	0
133	131	Goodwin House Incorporated	VA	831	582	100	149	2	2	0	0	0
134	133	Christian Health Care Center	NJ	681	297	92	292	2	1	1	0	0
135	140	Givens Estates	NC	841	620	91	130	2	2	0	0	0
136	134	Maple Knoll Communities, Inc.	OH	683	385	91	207	2	2	0	0	0
137	135	United Church Homes and Services	NC	956	538	90	328	3	3	0	0	0
138	137	Wesley Homes	WA	707	433	90	184	2	2	0	0	0
139	NR	Carroll Lutheran Village/The Lutheran Village at Miller's Grant	MD	838	637	86	115	2	2	0	0	0
140	138	Garden Spot Communities fka Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
141	139	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
142	136	Albright Care Services	PA	653	285	79	289	2	2	0	0	0
143	149	Bethesda Health Group, Inc.	MO	1,673	733	78	862	11	0	7	0	4
144	142	Moorings Park	FL	662	480	76	106	2	2	0	0	0
145	144	The Loomis Communities	MA	633	427	72	134	4	4	0	0	0
146	146	Sun Health Senior Living, LLC	AZ	845	637	61	147	3	3	0	0	0
147	147	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
148	148	Mather LifeWays	IL	792	665	56	71	3	2	1	0	0
149	NR	Amsterdam Continuing Care Health System, Inc.	NY	741	226	50	465	2	1	0	0	1
150	150	The New Jewish Home fka Jewish Home Lifecare	NY	838	24	0	814	3	0	1	0	2

NR: Not ranked in that year
fka: Formerly known as



3-1 2017 LeadingAge Ziegler 150

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

3-1d RANKED BY NURSING CARE BEDS

2017 NCB Rank	2016 NCB Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	The Evangelical Lutheran Good Samaritan Society	SD	17,839	5,131	2,274	10,434	168	67	8	8	85
2	2	Benedictine Health System	MN	5,270	625	1,484	3,161	39	24	1	5	9
3	3	Ascension Senior Living	MO	4,624	937	833	2,854	27	8	2	2	15
4	NR	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
5	5	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	4,198	1,341	640	2,217	22	6	4	1	11
6	4	Presence Life Connections	IL	3,362	1,090	256	2,016	22	6	0	0	16
7	73	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
8	7	Christian Homes, Inc.	MO	2,181	383	312	1,486	13	11	0	1	1
9	8	ACTS Retirement Services, Inc.	PA	7,862	5,529	901	1,432	21	21	0	0	0
10	9	Presbyterian Homes & Services	MN	7,135	3,632	2,201	1,302	43	13	23	4	3
11	10	National Senior Campuses	MD	19,051	16,346	1,421	1,284	16	16	0	0	0
12	15	Lutheran Senior Services	MO	3,535	1,608	733	1,194	11	8	0	1	2
13	12	Presbyterian Senior Living	PA	3,527	1,846	547	1,134	20	12	6	2	0
14	13	Covenant Health, Inc.	MA	1,476	0	364	1,112	12	0	0	4	8
15	11	Volunteers of America	VA	2,435	591	746	1,098	25	4	3	9	9
16	14	Elim Care, Inc.	MN	1,697	197	452	1,048	24	0	4	9	11
17	16	Covenant Retirement Communities	IL	5,022	3,155	884	983	18	14	1	2	1
18	17	Diakon Lutheran Social Ministries	PA	2,419	919	531	969	9	9	0	0	0
19	32	HumanGood fka Cornerstone (ABHOW & be.group)	CA	4,761	2,904	937	920	19	17	1	1	0
20	25	Augustana Care	MN	2,102	269	921	912	22	0	0	15	7
21	20	Ohio Living fka Ohio Presbyterian Retirement Services	OH	3,080	1,596	586	898	12	12	0	0	0
22	36	Asbury Communities	MD	3,455	2,119	457	879	8	7	0	0	1
23	24	Otterbein Senior Lifestyle Choices	OH	2,037	786	382	869	14	6	0	0	8
24	21	Bethesda Health Group, Inc.	MO	1,673	733	78	862	11	0	7	0	4
25	18	Presbyterian Manors of Mid-America, Inc.	KS	2,340	922	579	839	17	16	0	1	0

NR: Not ranked in that year
fka: Formerly known as

3-1 2017 LeadingAge Ziegler 150

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

2017 NCB Rank	2016 NCB Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	22	Lifespace Communities, Inc.	IA	4,069	3,066	174	829	12	12	0	0	0
27	19	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
28	6	The New Jewish Home fka Jewish Home Lifecare	NY	838	24	0	814	3	0	1	0	2
29	23	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
30	26	Franciscan Communities, Inc.	IL	1,950	738	438	774	8	4	1	3	0
31	29	United Church Homes, Inc.	OH	1,375	326	275	774	10	6	1	0	3
32	31	Lutheran Life Communities	IL	1,576	408	407	761	6	6	0	0	0
33	27	Westminster Communities of Florida	FL	3,270	2,049	470	751	9	9	0	0	0
34	28	Lutheran Services Carolinas, Inc.	NC	1,243	257	254	732	9	1	1	1	6
35	30	Elant	NY	995	148	144	703	6	1	0	1	4
36	34	Phoebe Ministries	PA	1,318	374	255	689	4	4	0	0	0
37	33	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,433	1,496	253	684	5	3	1	0	1
38	35	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	1,593	398	520	675	7	7	0	0	0
39	44	Providence Life Services	IL	1,713	725	360	628	9	1	4	1	3
40	38	Loretto	NY	1,498	282	593	623	8	1	2	4	1
41	39	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
42	40	Greencroft Communities	IN	1,781	637	534	610	8	7	1	0	0
43	41	Retirement Housing Foundation	CA	4,105	2,635	875	595	18	9	8	1	0
44	48	The Kendal Corporation	PA	3,758	2,547	656	555	15	13	2	0	0
45	43	Eventide	MN	1,067	71	442	554	6	5	0	1	0
46	47	Front Porch Communities and Services	CA	2,760	1,965	255	540	10	5	5	0	0
47	49	Masonicare	CT	1,264	458	277	529	5	1	1	1	2
48	50	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
49	37	Ecumen	MN	2,354	376	1,452	526	32	0	5	20	7
50	45	National Church Residences	OH	1,809	781	508	520	12	5	2	4	1

NR: Not ranked in that year
 fka: Formerly known as



3-1 2017 LeadingAge Ziegler 150

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

3-1d RANKED BY NURSING CARE BEDS

2017 NCB Rank	2016 NCB Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	51	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
52	NR	Amsterdam Continuing Care Health System, Inc.	NY	741	226	50	465	2	1	0	0	1
53	52	LindenGrove Communities fka LindenGrove, Inc.	WI	650	0	189	461	4	0	0	0	4
54	54	Homewood Retirement Centers	MD	1,694	965	278	451	5	4	1	0	0
55	53	WesleyLife	IA	1,440	681	311	448	7	7	0	0	0
56	55	Lutheran SeniorLife	PA	1,125	491	192	442	7	2	5	0	0
57	62	Wellspring Lutheran Services	MI	781	128	224	429	11	1	3	2	5
58	57	Eskaton	CA	1,315	195	694	426	13	1	1	8	3
59	58	United Methodist Homes	NY	1,057	360	271	426	4	3	0	1	0
60	46	St. Ann's Community	NY	863	246	195	422	2	2	0	0	0
61	56	Heritage Ministries	NY	785	243	122	420	9	1	3	2	3
62	79	Saint Therese	MN	946	402	134	410	5	3	0	1	1
63	59	Pacific Retirement Services, Inc.	OR	2,856	2,116	333	407	9	8	1	0	0
64	61	Genacross Lutheran Services fka Lutheran Homes Society	OH	706	142	171	393	5	2	1	0	2
65	63	Presbyterian Communities and Services	TX	843	329	134	380	2	2	0	0	0
66	64	Concordia Lutheran Ministries	PA	1,898	554	965	379	12	5	0	6	1
67	66	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
68	65	Episcopal Senior Communities	CA	1,587	1,074	137	376	6	6	0	0	0
69	NR	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
70	67	Presbyterian Homes	IL	1,437	855	217	365	5	3	1	1	0
71	69	Lutheran Homes of South Carolina, Inc.	SC	1,073	405	308	360	5	5	0	0	0
72	68	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
73	71	Samaritas fka Lutheran Social Services of Michigan	MI	770	294	120	356	5	1	2	0	2
74	90	Springpoint Senior Living Inc.	NJ	2,279	1,649	279	351	7	7	0	0	0
75	91	Lutheran Social Ministries of New Jersey, Inc.	NJ	779	281	150	348	3	1	0	0	2

NR: Not ranked in that year
fka: Formerly known as

3-1 2017 LeadingAge Ziegler 150

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

2017 NCB Rank	2016 NCB Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	74	SpiriTrust Lutheran	PA	1,218	553	321	344	6	6	0	0	0
77	75	Shell Point Retirement Community	FL	2,110	1,384	398	328	2	2	0	0	0
78	76	United Church Homes and Services	NC	956	538	90	328	3	3	0	0	0
79	70	Buckner Retirement Services, Inc.	TX	1,322	723	273	326	5	5	0	0	0
80	77	Baptist Village Communities	OK	1,349	783	241	325	9	3	5	1	0
81	78	Morningside Ministries	TX	890	385	182	323	3	3	0	0	0
82	NR	Bethany St. Joseph Corporation	WI	632	152	158	322	13	0	4	5	4
83	80	BHI Senior Living, Inc.	IN	1,176	243	612	321	4	4	0	0	0
84	72	United Methodist Memorial Home	IN	764	188	255	321	3	3	0	0	0
85	81	Mississippi Methodist Senior Services, Inc.	MS	1,434	776	338	320	12	2	8	0	2
86	82	Senior Quality Lifestyle Corporation	TX	1,858	1,130	419	309	6	6	0	0	0
87	83	Christian Health Care Center	NJ	681	297	92	292	2	1	1	0	0
88	84	Friendship Senior Options	IL	1,229	755	183	291	2	2	0	0	0
89	85	Albright Care Services	PA	653	285	79	289	2	2	0	0	0
90	86	Presbyterian Communities of South Carolina	SC	894	297	313	284	5	5	0	0	0
91	89	Willow Valley Communities	PA	2,024	1,522	219	283	3	3	0	0	0
92	87	Virginia United Methodist Homes, Inc.	VA	1,229	513	433	291	7	6	0	1	0
93	88	Integrace	MD	1,139	634	228	277	4	3	0	1	0
94	92	Holland Home	MI	1,434	723	450	261	4	2	0	1	1
95	93	Presby's Inspired Life	PA	925	472	199	254	4	2	0	1	1
96	94	Methodist Retirement Communities	TX	973	432	288	253	5	4	0	1	0
97	95	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	1,024	88	684	252	5	1	0	4	0
98	96	Masonic Homes of Kentucky	KY	654	258	153	243	3	1	1	0	1
99	97	VMP	WI	889	447	205	237	2	2	0	0	0
100	99	Christian Care Centers, Inc.	TX	837	408	206	223	3	3	0	0	0

NR: Not ranked in that year
fka: Formerly known as

LeadingAge 150 Ziegler

3-1 2017 LeadingAge Ziegler 150

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

3-1d RANKED BY NURSING CARE BEDS

2017 NCB Rank	2016 NCB Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	101	Liberty Lutheran Services	PA	904	373	314	217	4	3	0	1	0
102	100	LifeSpire of Virginia fka Virginia Baptist Homes, Inc.	VA	1,174	738	219	217	4	4	0	0	0
103	103	Menno Haven	PA	920	531	177	212	3	2	1	0	0
104	104	LutherCare	PA	811	474	126	211	3	2	0	0	1
105	105	Luther Manor	WI	732	366	156	210	2	1	0	1	0
106	107	Maple Knoll Communities, Inc.	OH	683	385	91	207	2	2	0	0	0
107	108	The United Methodist Retirement Homes, Inc.	NC	932	622	108	202	3	3	0	0	0
108	109	The Ohio Masonic Home	OH	781	338	249	194	3	2	1	0	0
109	111	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	0	3	0	0
110	112	St. John's Lutheran Ministries	MT	671	196	289	186	5	4	0	1	0
111	102	Cedar Community	WI	832	414	233	185	6	1	2	2	1
112	110	Simpson Senior Services	PA	809	454	170	185	3	3	0	0	0
113	126	Wesley Homes	WA	707	433	90	184	2	2	0	0	0
114	114	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	652	334	135	183	4	2	1	0	1
115	115	Episcopal SeniorLife Communities	NY	650	337	131	182	9	1	4	3	1
116	117	National Lutheran Inc. fka National Lutheran Home for the Aged	MD	818	518	120	180	3	2	1	0	0
117	116	Christian Living Communities	CO	818	417	223	178	4	3	0	1	0
118	113	Messiah Lifeways	PA	688	353	157	178	2	1	1	0	0
119	118	Sunset Retirement Communities and Services	MI	698	304	225	169	4	2	0	1	1
120	119	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
121	NR	Grace Inspired Ministries fka Lutheran Community at Telford & Rockhill Mennonite	PA	767	451	151	165	2	2	0	0	0
122	120	Ingleside fka Westminster Ingleside Retirement Communities	DC	885	607	113	165	3	3	0	0	0
123	121	LifeStream Complete Senior Living, Inc.	AZ	665	357	148	160	4	1	2	0	1
124	125	Goodwin House Incorporated	VA	831	582	100	149	2	2	0	0	0
125	127	Sun Health Senior Living, LLC	AZ	845	637	61	147	3	3	0	0	0

NR: Not ranked in that year
fka: Formerly known as

3-1 2017 LeadingAge Ziegler 150

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

2017 NCB Rank	2016 NCB Rank	System Name	State	Units (as of 12/31/16)				Communities (as of 12/31/16)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	122	Life Enriching Communities	OH	743	462	137	144	2	2	0	0	0
127	130	Living Branches	PA	850	461	246	143	3	2	0	1	0
128	131	Northern California Presbyterian Homes & Services	CA	1,062	818	103	141	4	3	1	0	0
129	132	Oakwood Lutheran Senior Ministries	WI	917	620	160	137	2	2	0	0	0
130	123	Sunnyside Presbyterian Home	VA	762	499	129	134	3	3	0	0	0
131	133	The Loomis Communities	MA	633	427	72	134	4	4	0	0	0
132	134	Western Home Communities	IA	843	473	238	132	3	1	2	0	0
133	129	Givens Estates	NC	841	620	91	130	2	2	0	0	0
134	135	Blue Skies of Texas	TX	996	740	129	127	2	2	0	0	0
135	138	Garden Spot Communities fka Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
136	NR	Carroll Lutheran Village/The Lutheran Village at Miller's Grant	MD	838	637	86	115	2	2	0	0	0
137	139	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	3	0	0	0
138	140	Methodist ElderCare Services fka Methodist ElderCare	OH	726	337	283	106	3	1	2	0	0
139	141	Moorings Park	FL	662	480	76	106	2	2	0	0	0
140	142	Landis Communities	PA	745	493	149	103	3	1	1	0	1
141	NR	Haverland Carter Lifestyle Group	NM	794	414	282	98	3	2	0	1	0
142	NR	Wesley Willows	IL	764	503	170	91	2	1	1	0	0
143	144	Presbyterian Villages of Michigan	MI	1,189	915	184	90	9	1	7	1	0
144	Next 50	The RiverWoods Group	NH	734	523	124	87	2	2	0	0	0
145	146	Mather LifeWays	IL	792	665	56	71	3	2	1	0	0
146	147	Christian Care Companies	AZ	2,067	1,647	352	68	5	1	3	1	0
147	148	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	1,575	1,050	463	62	11	2	6	3	0
148	Next 50	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
149	149	Bethesda Senior Living Communities	CO	1,562	155	1,407	0	18	0	2	16	0
150	150	Vista Prairie Communities	MN	917	100	817	0	10	0	0	10	0

NR: Not ranked in that year
fka: Formerly known as



3-1 2017 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 "Next 50" represents organizations ranked from 151-200.

First 25 (627 to 507 Total Units)

Baptist Homes Society (PA)
 Baptist Retirement Homes of North Carolina, Inc. (NC)
 Bethany Lutheran Homes, Inc. (WI)
 Chelsea Jewish Lifecare, Inc. fka Chelsea Jewish Nursing Home Foundation, Inc. (MA)
 Christian Benevolent Association fka Christian Village Communities (OH)
 Church Homes Inc. (CT)
 Deaconess Abundant Life Communities (MA)
 EHM Senior Solutions fka Evangelical Lutheran Homes of Michigan (MI)
 Episcopal Communities & Services (CA)
 Episcopal Retirement Services (OH)
 Friendly Senior Living (NY)
 Friends Homes, Inc. (NC)
 Lutheran Life Villages (IN)
 Masonic Homes of California (CA)
 Niagara Lutheran Health System (NY)
 Porter Hills (MI)
 Rockwood Retirement Communities (WA)
 Shepherd of the Valley Lutheran Retirement Services (OH)
 Sholom Community Alliance (MN)
 Smith Senior Living (IL)
 The Estaugh T/A Medford Leas (NJ)
 The Knolls fka Bethel Communities Management 1, LLC (NY)
 The Lutheran Home Association (WI)
 United Methodist Homes (CT)
 United Methodist Retirement Communities (MI)

Second 25 (506 to 366 Total Units)

A.G. Rhodes (GA)
 Allegheny Lutheran Social Ministries (PA)
 Baptist Life Communities (KY)
 Beechwood Continuing Care (NY)
 Bethesda (Bethesda Health & Housing) (MN)
 Brazos Presbyterian Homes, Inc. (TX)
 Christian Care Communities (KY)
 CJE Senior Life (IL)
 Clark Retirement Community (MI)
 Colonial Senior Services, Inc. (OH)
 Good Shepherd Communities (NY)
 Jewish Senior Life of Metropolitan Detroit (MI)
 Judson Services Inc. (OH)
 Michigan Masonic Homes (Masonic Pathways) (MI)
 Presbyterian Homes and Services of Kentucky (KY)
 Presbyterian Homes of Georgia, Inc. (GA)
 Redstone Highlands Senior Living Communities (PA)
 Saint Mary's Home of Erie dba Saint Mary's East and Saint Mary's at Asbury Ridge (PA)
 South Carolina Baptist Ministries for the Aging (SC)
 The Eliza Jennings Senior Care Network (OH)
 United Methodist Services for the Aging (SC)
 Valley View Retirement Community (PA)
 Wesbury United Methodist Retirement Community (PA)
 Wesley Woods Senior Living (GA)
 Willow Brook Christian Communities (OH)

3-2 2017 LeadingAge Ziegler 150

The Rankings: Change at a Glance

3-2a GREATEST CHANGES IN UNITS

Greatest Increase and Decrease	State	YE 2017 Units	YE 2016 Units	Change
Greatest Increase				
HumanGood fka Cornerstone (ABHOW & be.group)	CA	4,761	3,318	+1,443
Transforming Age fka Presbyterian Retirement Communities Northwest	WA	1,575	668	+907
Asbury Communities	MD	3,455	2,914	+541
National Senior Campuses	MD	19,051	18,527	+524
Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	4,198	3,745	+453
Greatest Decrease				
The New Jewish Home fka Jewish Home Lifecare	NY	838	1,585	-747
Presence Life Connections	IL	3,362	3,558	-196
Hebrew SeniorLife, Inc.	MA	1,592	1,764	-172
Buckner Retirement Services, Inc.	TX	1,322	1,468	-146
Presbyterian Manors of Mid-America, Inc.	KS	2,340	2,471	-131
Ascension Senior Living	MO	4,624	4,748	-124

3-2b GREATEST CHANGES IN RANK

Greatest Upward and Downward Change	State	2017 Rank	2016 Rank	Change
Greatest Upward Movement				
Transforming Age fka Presbyterian Retirement Communities Northwest	WA	48	135	+87
Saint Therese	MN	85	127	+42
The RiverWoods Group	NH	128	164	+36
Elder Care Alliance	CA	142	168	+26
Lutheran Social Ministries of New Jersey, Inc.	NJ	117	133	+16
Greatest Downward Movement				
The New Jewish Home fka Jewish Home Lifecare	NY	103	45	-58
Episcopal SeniorLife Communities	NY	146	129	-17
LindenGrove Communities fka LindenGrove, Inc.	WI	147	132	-15
Life Enriching Communities	OH	126	113	-13
Sunnyside Presbyterian Home	VA	123	111	-12

LeadingAge 150 Ziegler

Chapter 4

Analysis of the Data

The LeadingAge Ziegler 150 are examined through categories, including: total units, total communities, geographic coverage, location, ratings, accreditation, number of employees, affiliations, founding dates, provision of government-subsidized (affordable) housing, and the provision of home and community-based services. This year's publication also has 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 2017 LZ 150 provides a side-by-side comparison of the unit mix for 2016 compared to 2015 for each of the organizations. The 2017 LZ 150 organizations own approximately 265,000 market-rate senior living units. By breaking the data into the largest 10, 25, 50 and 100 (Chart 4-1c), it is evident that the ratio of units held by the largest 50 compared with the percentage of total units in the LZ 150 is not balanced, e.g., the largest 50 systems hold nearly 65% of the total units. The 10 largest systems own more than 30% of the total LZ 150 units. The average system within the 2017 LZ 150 had more than 1,767 units in 2016 (Chart 4-1b). Approximately 65% of the 2017 LZ 150's total communities are Life Plan Communities, with the remaining 35% evenly divided between stand-alone ILs, ALs, and NHs.

Summary of Not-for-Profit Units. These columns show the total number of units, followed by a breakdown of this total by level of care for each system. The first set of columns show the unit mix as of 12/31/16. The second set of columns show the unit mix as of 12/31/15.

Change in Total Units from 2015 to 2016. This column provides the change in the listed organization's TOTAL market-rate units (all levels of care) between year-end 2016 and year-end 2015.

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 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 2015 LZ 100 compared to the unit mix of the 2016 LZ 150, compared to the unit mix of the 2017 LZ 150). Charts 4-1d-h provides a more graphic illustration of the type of change occurring in the LZ 150. For all the year-over-year comparisons made in 4.1b-4.1h, note the increase to 150 as part of the 2014, 2015, and 2016 publications. 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 presented in Chart 4-1a is followed by a side-by-side comparison in Chart 4-2a of the community portfolios of the 2017 LZ 150 for 2016 compared to their portfolios at the end of 2015.

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 Life Plan Community (LPC). 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 12/31/16. The second set of columns shows the communities owned, by type, as of 12/31/15.

Change in Total Communities from 2015 to 2016. This column provides the change in the listed organization's TOTAL communities (all types, excluding affordable housing) between year-end 2015 and year-end 2016. 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 2015 LZ 100 compared to types of communities owned by the 2016 LZ 150, compared to the types of communities owned by the 2017 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 the location of their headquarters. Pennsylvania is home to more LZ 150 headquarters than any other state, more than twice as many as the next leading states of Minnesota, New York, Illinois, Ohio, and California. Five of Pennsylvania's multi-site headquarters are in the largest 25.

Metropolitan Statistical Areas (MSAs)

Metropolitan Statistical Areas (MSAs) are defined by the Office of Management and Budget (OMB) for purposes of tabulating statistics on clearly defined metropolitan boundaries. These boundaries are based on 2017 data from the U.S. Census Bureau. Areas are identified by county, with several counties making up a 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 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 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 its properties, regardless of type (including government-subsidized senior living). For some, the market area may be established by implicit boundaries, due to regulatory constraints or even due to the system's own name. Some multi-sites may change their names to more accurately reflect new growth strategies.

The LZ 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. Several of the national systems focus their operations either west or east of the Mississippi River or Rocky Mountains. A few of the national systems have an abundance of properties broadly scattered across the country, for example: Pacific Retirement Services, Inc. (LZ 150 #20) — a national system with a disparate geographic distribution of its communities with locations primarily on the West Coast, but two communities in Wisconsin and one in Texas. Retirement Housing Foundation (LZ 150 #10) is a national system with communities in multiple states across the country.
- **Across States.** Systems whose communities are located among multiple states, primarily in one region of the United States. Example: Presbyterian Senior Living (LZ 150 #14) is classified as an across states system with a focus in the Mid-Atlantic U.S.
- **Tri-state.** Systems whose communities are located across three states, typically contiguous. Example: Elim Care (LZ 150 #41) has communities located in Iowa, Minnesota, and North Dakota.
- **Bi-state.** Systems whose communities are located across two states, typically contiguous. Example: Springpoint Senior Living (LZ 150 #27) had all of its communities within New Jersey as of year-end 2016. In 2017, another organization affiliated with Springpoint, which now puts Springpoint communities in both New Jersey and Delaware, a Bi-state designation.
- **Single State.** Systems whose communities are contained within a single state's borders and are spread across the state. Example: SantaFe Senior Living (LZ 150 #62)—multiple communities within Florida, spread across the state (from southeast Florida to north central Florida, east and west).
- **State Region.** Systems whose communities are contained within a single region within a single state's borders. Example: WesleyLife (LZ 150 #53)—multiple communities centrally concentrated in Iowa.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: Presby's Inspired Life (LZ 150 #88)—multiple communities throughout the greater Philadelphia, Pennsylvania area.

- **Sub-metropolitan.** Systems whose communities are contained within a sub-section of a metropolitan area. The larger the metropolitan area, the more likely the possibility that a multi-site may emerge within a sub-metropolitan area. Example: The communities of Goodwin House Incorporated (LZ 150 #107) are in the southwestern quadrant of the DC-Arlington metropolitan area.

Chart 4-6a shows that a large majority, nearly 72%, of the LZ 150 organizations operate within a single state's boundaries (Single State, State Region, Metropolitan or Sub-metropolitan). Generally, a multi-site moves gradually from single state, to bi-state, to tri-state, and then to a national multi-site. For example, Augustana Care Corporation operated in the Minneapolis area for most of its existence. In the 2000s, it added communities in other areas of Minnesota. In 2011, it expanded to Colorado. National multi-sites are 10% of the LZ 150 and tend to be among the largest of the LZ 150 organizations; however, 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 #13) has a secondary metropolitan market in St. Louis. The secondary classification provides a snapshot of a system's geographic concentration of communities. More than 50 of the LZ 150 systems have such a market concentration. (Chart 4-6c)

Corporate Name Changes

An ongoing trend among senior living organizations throughout the country is that of changing the name of the organization to better reflect the services provided. Section 4-7 lists the 2016 name changes.

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 did not have its debt rated by that agency as of 12/31/16. Forty-eight (48) of the LZ 150 organizations have outstanding debt rated by Fitch Ratings and/or Standard & Poor's. Chart 4-8b presents the categories of each of the ratings, showing that the majority, 50%, 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 150 publication began capturing the type of revenue generated by each respective organization. Starting with the 2015 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 also surveyed. Most of the organizations provided this information. Where information was not reported, the most recently available 990s provided the detail needed for overall revenue. To avoid detailing each organization's total revenue for fiscal year 2016, organizations were grouped into tiers based on their overall revenue. The largest LZ 150 organizations have revenues beyond \$200 million (25 organizations). The largest number of LZ 150 organizations fall within the Tier III category, which reflects annual revenue between \$50 million and \$99 million. Section 4-9 details the revenue statistics.

Corporate Staff

Yet another area of the 2017 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 reported in this section.

Accreditation

For senior living organizations, accreditation may be sought through several accrediting bodies, but LPC accreditation is granted only through CARF. CARF accredits LPCs and aging services networks that are part of home, community or hospital-based systems; sites under a corporate organization; and other types of providers. Accreditation is a voluntary program that fosters an independent, equitable and objective evaluation process by an outside organization. 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, JCAHO (Joint Commission on the Accreditation of Healthcare Organizations), or, new to this year's listing, EAGLE (Educational Assessment Guidelines Leading toward Excellence) accreditation is shown in Chart 4-11a. A total of 147 communities within the LZ 150 are accredited through CARF; 46 have sought accreditation through JCAHO, and an additional 40 are accredited through EAGLE.

Staffing

The LZ 150 analyses include an examination of the number of full-time equivalents (FTEs) each organization employs. An average of 1,265 FTEs were employed per organization throughout 2016. Note that the number of FTEs decreased in the 2015 and 2016 publications with the expansion to the largest 150 organizations as the size of the organizations get smaller the further above the 100 ranking.

Affiliation

More than 85% of the LZ 150 organizations have an affiliation with a religious organization, predominantly Lutheran, Presbyterian, and Catholic, or a fraternal or military group (Chart 4-14a). Lutheran organizations represent the largest number, with more than 46,000 units. Presbyterian affiliation follows with more than 30,000 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 several of the LZ 150 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Section 4-15 and Chapter 6 detail these listings further. The data reveal that among the LZ 150, nearly half (43%) have affordable housing units.

Managed Units and Communities

There are several companies in the senior living sector whose primary business purpose is to provide management services to properties they do not own. The LZ 150 organizations are, on the contrary, primarily property owners. More than 37% of the LZ 150 manage and own senior living units (Chart 4-16c), but the overwhelming portion of their portfolio of units is owned.

Assisted and Skilled Composition

In the last two years, this report has tracked the proportion of assisted living and skilled nursing units that are private versus semi-private. There is a clear trend toward private assisted living units, with 91% being private. On the other hand, the skilled nursing units are more likely to be semi-private, with 51.9% of the units being semi-private and 48.1% private.

This year's publication is the seventh 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. Roughly 77% of the organizations offer memory support, with 35% offering both assisted living and skilled nursing memory care services. An additional 31% 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, and specifically drilled down into Continuing Care at Home (CCaH), Program of All-Inclusive Care for the Elderly (PACE), and hospice services for individuals in the greater community. Overall, nearly 55% of the LZ 150 organizations offer home and community-based services to non-residents. CCaH, a model growing in popularity, is offered by 14% of the LZ 150. Approximately 10% have PACE programs, and hospice services are being provided by more than 25%.

Technology

Beginning with the 2013 LZ 100, information was gathered regarding the adoption of various aging-related technologies. The technology findings are integrated into section 4-19. The majority of LZ 150 organizations, 82% and slightly more than 83% respectively, reported using User-Activated Emergency Response Systems and Access Control/Wander Management Systems. Additional detailed findings are reported throughout that section. Data were also gathered this year for single-site organizations. Chapter 6 reveals the proportion of those organizations who have adopted various technologies.

Joint Ventures

In-line with trending around partnerships and collaboration, the publication explores the number of LZ 150 organizations that are engaged in joint ventures, Accountable Care Organization (ACO), or bundled payment agreements. Slightly more than one-third of the LZ 150 organizations reported being in a joint venture, most commonly, with another not-for-profit organization, a hospital/health system or a home health/home care agency. Nearly half of the organizations are in a formal ACO or bundled payment contract for formal health care reform.

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2015 to 2016
				2016 Units				2015 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	1	National Senior Campuses	MD	19,051	16,346	1,421	1,284	18,527	15,873	1,370	1,284	524
2	2	The Evangelical Lutheran Good Samaritan Society	SD	17,839	5,131	2,274	10,434	17,822	5,013	2,286	10,523	17
3	3	ACTS Retirement Services, Inc.	PA	7,862	5,529	901	1,432	7,933	5,591	901	1,441	-71
4	4	Presbyterian Homes & Services	MN	7,135	3,632	2,201	1,302	7,056	3,503	2,127	1,426	79
5	5	Benedictine Health System	MN	5,270	625	1,484	3,161	5,270	625	1,484	3,161	0
6	6	Covenant Retirement Communities	IL	5,022	3,155	884	983	5,015	3,146	885	984	7
7	15	HumanGood fka Cornerstone (ABHOW & be.group)	CA	4,761	2,904	937	920	3,318	1,984	646	688	1,443
8	7	Ascension Senior Living	MO	4,624	937	833	2,854	4,748	925	833	2,990	-124
9	10	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	4,198	1,341	640	2,217	3,745	1,184	633	1,928	453
10	8	Retirement Housing Foundation	CA	4,105	2,635	875	595	4,099	2,636	868	595	6
11	9	Lifespace Communities, Inc.	IA	4,069	3,066	174	829	4,052	3,069	154	829	17
12	11	The Kendal Corporation	PA	3,758	2,547	656	555	3,726	2,522	666	538	32
13	14	Lutheran Senior Services	MO	3,535	1,608	733	1,194	3,326	1,614	709	1,003	209
14	13	Presbyterian Senior Living	PA	3,527	1,846	547	1,134	3,434	1,808	499	1,127	93
15	18	Asbury Communities	MD	3,455	2,119	457	879	2,914	1,932	335	647	541
16	12	Presence Life Connections	IL	3,362	1,090	256	2,016	3,558	1,021	369	2,168	-196
17	16	Westminster Communities of Florida	FL	3,270	2,049	470	751	3,254	2,027	476	751	16
18	NR	The Carmelite System, Inc.	NY	3,129	144	421	2,564	0	0	0	0	NR
19	17	Ohio Living fka Ohio Presbyterian Retirement Services	OH	3,080	1,596	586	898	3,178	1,686	574	918	-98
20	19	Pacific Retirement Services, Inc.	OR	2,856	2,116	333	407	2,856	2,116	333	407	0
21	20	Front Porch Communities and Services	CA	2,760	1,965	255	540	2,782	1,873	369	540	-22
22	24	Volunteers of America	VA	2,435	591	746	1,098	2,404	531	723	1,150	31
23	22	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,433	1,496	253	684	2,434	1,496	254	684	-1
24	23	Diakon Lutheran Social Ministries	PA	2,419	919	531	969	2,419	919	529	971	0
25	25	Ecumen	MN	2,354	376	1,452	526	2,393	290	1,477	626	-39

NR: Not ranked in that year
fka: Formerly known as

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2015 to 2016
				2016 Units				2015 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	21	Presbyterian Manors of Mid-America, Inc.	KS	2,340	922	579	839	2,471	926	590	955	-131
27	29	Springpoint Senior Living Inc.	NJ	2,279	1,649	279	351	1,967	1,429	271	267	312
28	26	Christian Homes, Inc.	MO	2,181	383	312	1,486	2,104	386	244	1,474	77
29	27	Shell Point Retirement Community	FL	2,110	1,384	398	328	2,085	1,368	389	328	25
30	31	Augustana Care	MN	2,102	269	921	912	1,941	0	1,160	781	161
31	36	Christian Care Companies	AZ	2,067	1,647	352	68	1,842	1,434	342	66	225
32	32	Otterbein Senior Lifestyle Choices	OH	2,037	786	382	869	1,919	730	382	807	118
33	28	Willow Valley Communities	PA	2,024	1,522	219	283	2,027	1,530	222	275	-3
34	30	Franciscan Communities, Inc.	IL	1,950	738	438	774	1,946	733	438	775	4
35	33	Concordia Lutheran Ministries	PA	1,898	554	965	379	1,898	554	965	379	0
36	35	Senior Quality Lifestyle Corporation	TX	1,858	1,130	419	309	1,858	1,130	419	309	0
37	34	National Church Residences	OH	1,809	781	508	520	1,860	779	539	542	-51
38	39	ArchCare	NY	1,782	0	59	1,723	1,738	1,337	59	342	44
39	37	Greencroft Communities	IN	1,781	637	534	610	1,779	635	534	610	2
40	42	Providence Life Services	IL	1,713	725	360	628	1,603	665	360	578	110
41	40	Elim Care, Inc.	MN	1,697	197	452	1,048	1,707	197	452	1,058	-10
42	41	Homewood Retirement Centers	MD	1,694	965	278	451	1,694	965	278	451	0
43	44	Bethesda Health Group, Inc.	MO	1,673	733	78	862	1,588	708	18	862	85
44	43	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	1,593	398	520	675	1,593	398	520	675	0
45	38	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	1,764	659	159	946	-172
46	46	Episcopal Senior Communities	CA	1,587	1,074	137	376	1,572	1,076	120	376	15
47	51	Lutheran Life Communities	IL	1,576	408	407	761	1,473	408	370	695	103
48	135	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	1,575	1,050	463	62	668	474	132	62	907
49	49	Bethesda Senior Living Communities	CO	1,562	155	1,407	0	1,482	155	1,327	0	80
50	47	Loretto	NY	1,498	282	593	623	1,498	282	593	623	0

fka: Formerly known as

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2015 to 2016
				2016 Units				2015 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	48	Magnolia Manor	GA	1,483	339	335	809	1,483	339	335	809	0
52	50	Covenant Health, Inc.	MA	1,476	0	364	1,112	1,476	0	364	1,112	0
53	54	WesleyLife	IA	1,440	681	311	448	1,441	684	302	455	-1
54	56	Presbyterian Homes	IL	1,437	855	217	365	1,423	841	217	365	14
55	53	Mississippi Methodist Senior Services, Inc.	MS	1,434	776	338	320	1,452	778	354	320	-18
56	55	Holland Home	MI	1,434	723	450	261	1,434	723	450	261	0
57	67	United Church Homes, Inc.	OH	1,375	326	275	774	1,227	310	193	724	148
58	60	Baptist Village Communities	OK	1,349	783	241	325	1,285	779	181	325	64
59	52	Buckner Retirement Services, Inc.	TX	1,322	723	273	326	1,468	845	267	356	-146
60	64	Phoebe Ministries	PA	1,318	374	255	689	1,230	374	175	681	88
61	57	Eskaton	CA	1,315	195	694	426	1,409	335	648	426	-94
62	59	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	1,306	876	316	114	0
63	61	Masonicare	CT	1,264	458	277	529	1,264	458	277	529	0
64	65	Lutheran Services Carolinas, Inc.	NC	1,243	257	254	732	1,230	244	254	732	13
65	63	Wesley Enhanced Living	PA	1,235	629	246	360	1,235	629	246	360	0
66	62	Friendship Senior Options, NFP	IL	1,229	755	183	291	1,243	770	183	290	-14
67	66	Virginia United Methodist Homes, Inc.	VA	1,226	513	433	280	1,227	514	435	278	-1
68	69	SpiriTrust Lutheran	PA	1,218	553	321	344	1,191	554	303	334	27
69	68	American Baptist Homes of the Midwest	MN	1,200	374	209	617	1,200	374	209	617	0
70	104	Presbyterian Villages of Michigan	MI	1,189	915	184	90	1,265	991	184	90	-76
71	71	BHI Senior Living, Inc.	IN	1,176	243	612	321	1,179	257	601	321	-3
72	70	LifeSpire of Virginia fka Virginia Baptist Homes, Inc.	VA	1,174	738	219	217	1,179	741	221	217	-5
73	72	Integrace	MD	1,139	634	228	277	1,150	645	228	277	-11
74	74	Lutheran SeniorLife	PA	1,125	491	192	442	1,106	472	192	442	19
75	75	Lutheran Homes of South Carolina, Inc.	SC	1,073	405	308	360	1,073	405	308	360	0

fka: Formerly known as

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2015 to 2016
				2016 Units				2015 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	78	Eventide	MN	1,067	71	442	554	1,054	71	402	581	13
77	76	Northern California Presbyterian Homes & Services	CA	1,062	818	103	141	1,062	818	103	141	0
78	77	United Methodist Homes	NY	1,057	360	271	426	1,055	366	263	426	2
79	79	Walker Methodist	MN	1,034	493	165	376	1,034	493	165	376	0
80	80	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	1,024	88	684	252	1,026	88	686	252	-2
81	82	Blue Skies of Texas	TX	996	740	129	127	988	732	129	127	8
82	81	Elant	NY	995	148	144	703	995	148	144	703	0
83	83	Methodist Retirement Communities	TX	973	432	288	253	974	433	288	253	-1
84	84	The Presbyterian Homes, Inc.	NC	970	648	133	189	958	636	133	189	12
85	85	United Church Homes and Services	NC	956	538	90	328	954	536	90	328	2
86	127	Saint Therese	MN	946	402	134	410	698	300	76	322	248
87	87	The United Methodist Retirement Homes, Inc.	NC	932	622	108	202	932	622	108	202	0
88	86	Presby's Inspired Life	PA	925	472	199	254	940	474	206	260	-15
89	88	Menno Haven	PA	920	531	177	212	920	531	177	212	0
90	94	Oakwood Lutheran Senior Ministries	WI	917	620	160	137	885	588	160	137	32
91	89	Vista Prairie Communities	MN	917	100	817	0	917	100	817	0	0
92	90	Liberty Lutheran Services	PA	904	373	314	217	902	384	301	217	2
93	95	Presbyterian Communities of South Carolina	SC	894	297	313	284	881	282	315	284	13
94	91	Morningside Ministries	TX	890	385	182	323	890	385	182	323	0
95	92	VMP	WI	889	447	205	237	889	447	205	237	0
96	93	Ingleside fka Westminster Ingleside Retirement Communities	DC	885	607	113	165	885	607	113	165	0
97	98	St. Ann's Community	NY	863	246	195	422	863	246	75	542	0
98	99	Living Branches	PA	850	461	246	143	850	461	246	143	0
99	100	Sun Health Senior Living, LLC	AZ	845	637	61	147	844	637	61	146	1
100	109	Western Home Communities	IA	843	473	238	132	790	420	238	132	53

fka: Formerly known as

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2015 to 2016
				2016 Units				2015 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
101	101	Presbyterian Communities and Services	TX	843	329	134	380	843	329	134	380	0
102	106	Givens Estates	NC	841	620	91	130	818	597	77	144	23
103	NR	Carroll Lutheran Village/The Lutheran Village at Miller's Grant	MD	838	637	86	115	551	398	50	103	NR
104	45	The New Jewish Home fka Jewish Home Lifecare	NY	838	24	0	814	1,585	24	0	1,561	-747
105	116	Christian Care Centers, Inc.	TX	837	408	206	223	747	386	138	223	90
106	96	Cedar Community	WI	832	414	233	185	872	417	240	215	-40
107	103	Goodwin House Incorporated	VA	831	582	100	149	832	583	100	149	-1
108	105	Los Angeles Jewish Home	CA	831	50	271	510	831	50	271	510	0
109	122	National Lutheran Inc. fka National Lutheran Home for the Aged	MD	818	518	120	180	713	417	120	176	105
110	117	Christian Living Communities	CO	818	417	223	178	744	414	152	178	74
111	107	LutherCare	PA	811	474	126	211	811	474	126	211	0
112	102	Simpson Senior Services	PA	809	454	170	185	839	494	153	192	-30
113	NR	Haverland Carter Lifestyle Group	NM	794	414	282	98	0	0	0	0	NR
114	119	Mather LifeWays	IL	792	665	56	71	741	624	46	71	51
115	108	Heritage Ministries	NY	785	243	122	420	808	253	122	433	-23
116	110	The Ohio Masonic Home	OH	781	338	249	194	781	338	249	194	0
117	120	Wellspring Lutheran Services	MI	781	128	224	429	736	128	224	384	45
118	133	Lutheran Social Ministries of New Jersey, Inc.	NJ	779	281	150	348	678	281	130	267	101
119	112	Samaritas fka Lutheran Social Services of Michigan	MI	770	294	120	356	770	294	120	356	0
120	NR	Grace Inspired Ministries fka Lutheran Community at Telford & Rockhill Mennonite	PA	767	451	151	165	0	0	0	0	NR
121	NR	United Church of Christ Homes	PA	766	267	124	375	0	0	0	0	NR
122	114	Wesley Willows	IL	764	503	170	91	749	488	170	91	15
123	73	United Methodist Memorial Home	IN	764	188	255	321	764	188	255	321	0
124	111	Sunnyside Presbyterian Home	VA	762	499	129	134	779	500	129	150	-17
125	115	Garden Spot Communities fka Garden Spot Village	PA	747	542	86	119	747	542	86	119	0

NR: Not ranked in that year
fka: Formerly known as

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units 4-1a RANK, DETAILED BY UNITS (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2015 to 2016
				2016 Units				2015 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
126	118	Landis Communities	PA	745	493	149	103	743	491	149	103	2
127	113	Life Enriching Communities	OH	743	462	137	144	763	467	137	159	-20
128	NR	Amsterdam Continuing Care Health System, Inc.	NY	741	226	50	465	0	0	0	0	NR
129	Next 50	The RiverWoods Group	NH	734	523	124	87	542	393	71	78	192
130	121	Luther Manor	WI	732	366	156	210	732	366	156	210	0
131	124	Methodist ElderCare Services fka Methodist ElderCare	OH	726	337	283	106	700	338	256	106	26
132	130	Wesley Homes	WA	707	433	90	184	688	453	87	148	19
133	123	Genacross Lutheran Services fka Lutheran Homes Society	OH	706	142	171	393	702	142	171	389	4
134	126	Sunset Retirement Communities and Services	MI	698	304	225	169	698	304	225	169	0
135	128	Messiah Lifeways	PA	688	353	157	178	695	354	157	184	-7
136	136	Maple Knoll Communities, Inc.	OH	683	385	91	207	667	369	91	207	16
137	131	Christian Health Care Center	NJ	681	297	92	292	681	297	92	292	0
138	132	CRISTA Senior Living	WA	680	382	131	167	680	382	131	167	0
139	134	Vincentian Collaborative Services	PA	675	66	82	527	675	66	82	527	0
140	150	St. John's Lutheran Ministries	MT	671	196	289	186	588	145	257	186	83
141	137	LifeStream Complete Senior Living, Inc.	AZ	665	357	148	160	661	357	144	160	4
142	148	Moorings Park	FL	662	480	76	106	598	416	76	106	64
143	Next 50	Elder Care Alliance	CA	658	135	464	59	522	0	463	59	NR
144	141	Masonic Homes of Kentucky	KY	654	258	153	243	638	248	147	243	16
145	138	Albright Care Services	PA	653	285	79	289	658	279	89	290	-5
146	139	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	652	334	135	183	652	334	135	183	0
147	129	Episcopal SeniorLife Communities	NY	650	337	131	182	690	377	131	182	-40
148	140	LindenGrove Communities fka LindenGrove, Inc.	WI	650	0	189	461	650	0	189	461	0
149	142	The Loomis Communities	MA	633	427	72	134	634	426	74	134	-1
150	NR	Bethany St. Joseph Corporation	WI	632	152	158	322	0	0	0	0	NR
TOTAL UNITS				265,139	126,906	52,855	85,378	252,698	122,308	50,111	80,279	5,189

NR: Not ranked in that year
fka: Formerly known as

LeadingAge 150 Ziegler

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1b SUMMARY OF UNIT MIX (BY LARGEST 10, 25, 50, 100 & 150)

Largest	ILU	ALU	NCB	Total Units	% as total of LZ 150 units
10	42,235	12,450	25,182	79,867	30.1%
25	65,763	20,320	40,226	126,309	47.6%
50	84,811	31,499	55,977	172,287	65.0%
100	109,436	45,145	73,440	228,021	86.0%
150	126,906	52,855	85,378	265,139	100.0%

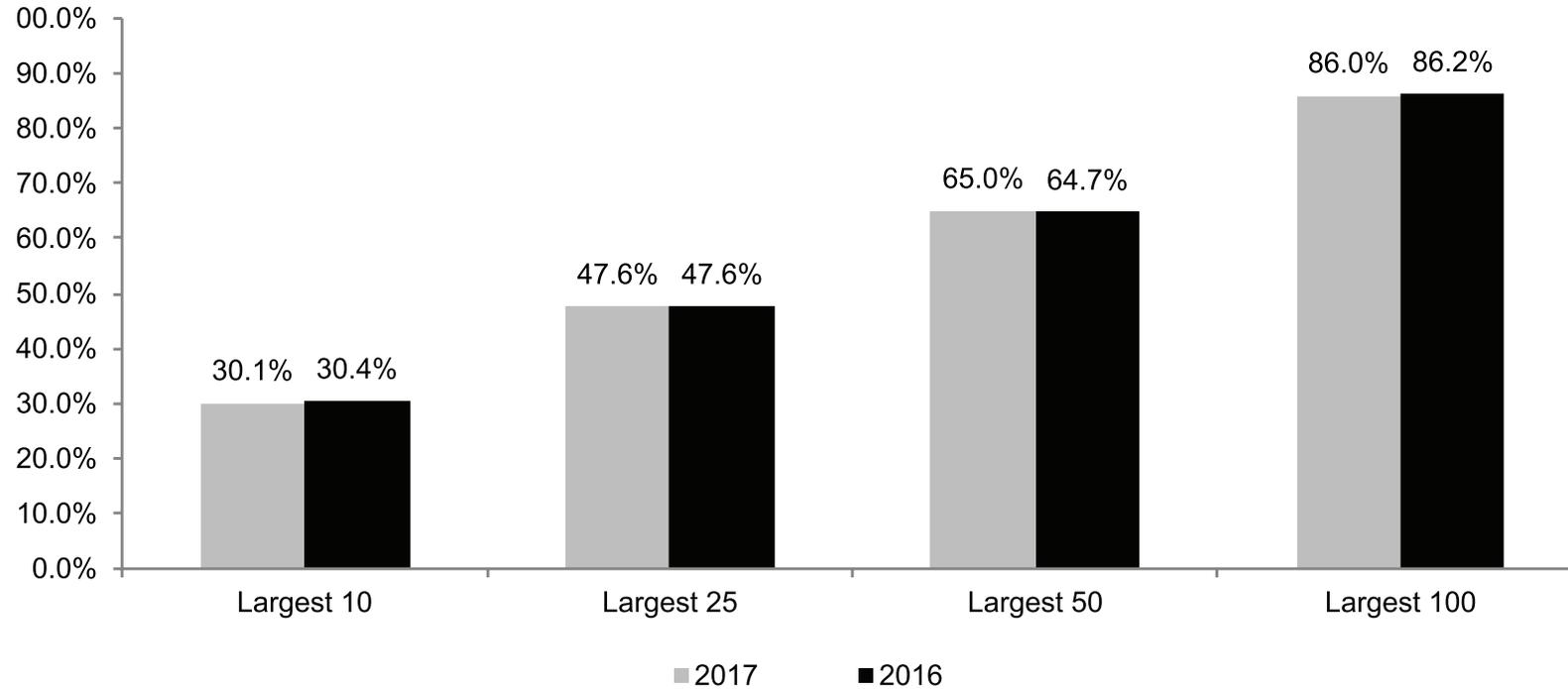
Largest	2017 Total Units	2016 Total Units	Change in total units	Percent change in total units
10	79,867	78,267	1,600	2.0%
25	126,309	122,734	3,575	2.8%
50	172,287	166,743	5,544	3.2%
100	228,021	222,070	5,951	2.6%
150	265,139	257,611	7,528	2.8%

Analysis of Unit Mix for Each Year's Respective LZ 150 Listing				
	ILU	ALU	NCB	Total Units
2014 LZ 150				
2013 avg units/system	781.8	303.4	483.4	1,575.2
% of total 150	49.8%	19.3%	30.8%	100.0%
2015 LZ 150				
2014 avg units/system	773.4	311.4	451.7	1,531.6
% of total 150	49.1%	18.3%	32.6%	100.0%
2016 LZ 150				
2015 avg units/system	827.1	342.9	547.4	1,717.4
% of total 150	48.2%	20.0%	31.9%	100.0%
2017 LZ 150				
2016 avg units/system	846.0	352.4	569.2	1,767.6
% of total 150	47.9%	19.9%	32.2%	100.0%

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

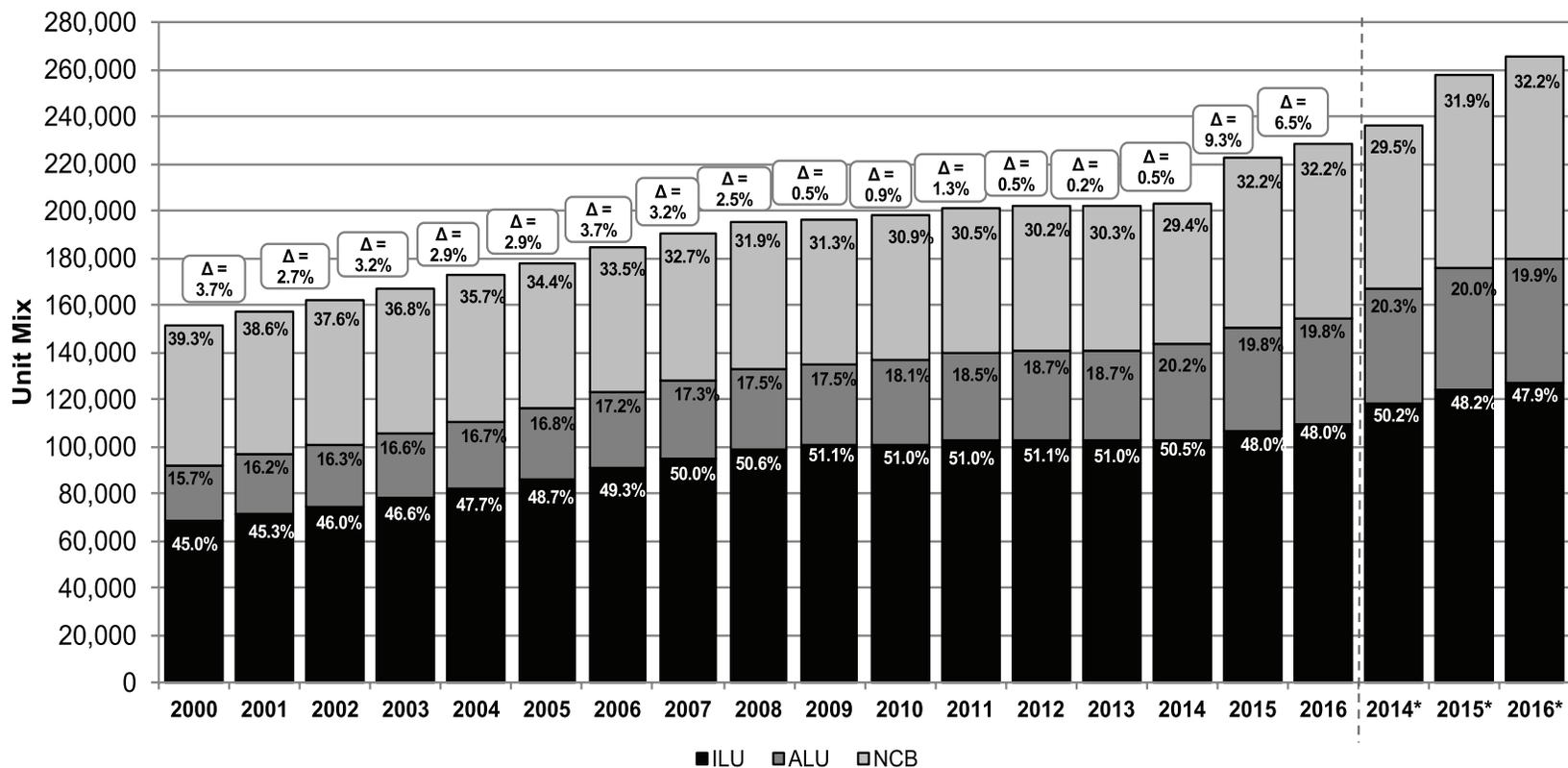
4-1c PERCENTAGE OF TOTAL UNITS OWNED (BY LARGEST 10, 25, 50 & 100)



4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1d TOTAL UNIT MIX BY YEAR, BY TOTAL UNITS, 2000 THROUGH 2016 FOR 2017 LZ 150



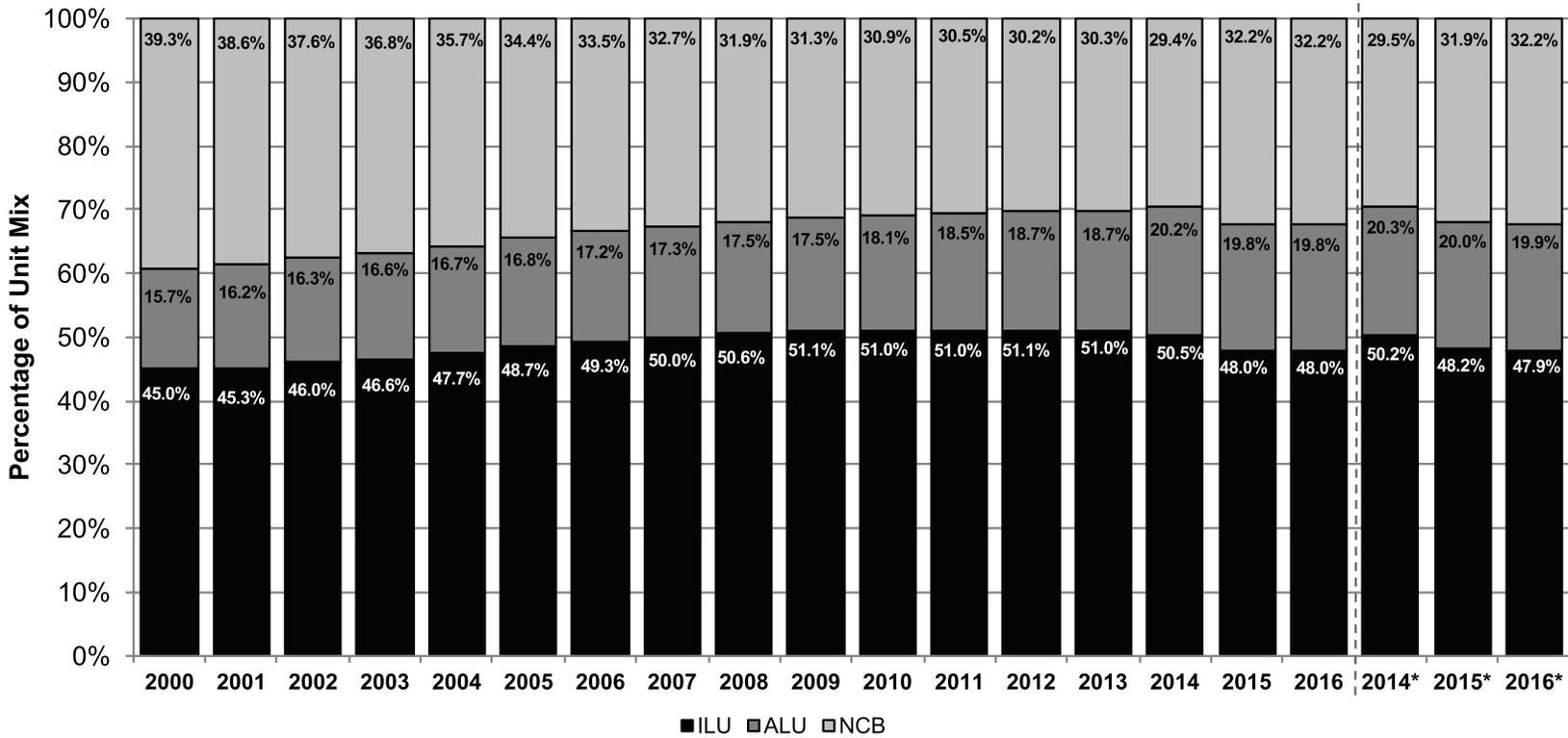
*Note change from 100 to 150 with the 2014 publication

The percentage change (9.3%) from 2014-2015 is largely attributed to that year's inclusion of several large Catholic senior living organizations.

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1e TOTAL UNIT MIX BY YEAR, BY PERCENT, 2000 THROUGH 2016 FOR 2017 LZ 150

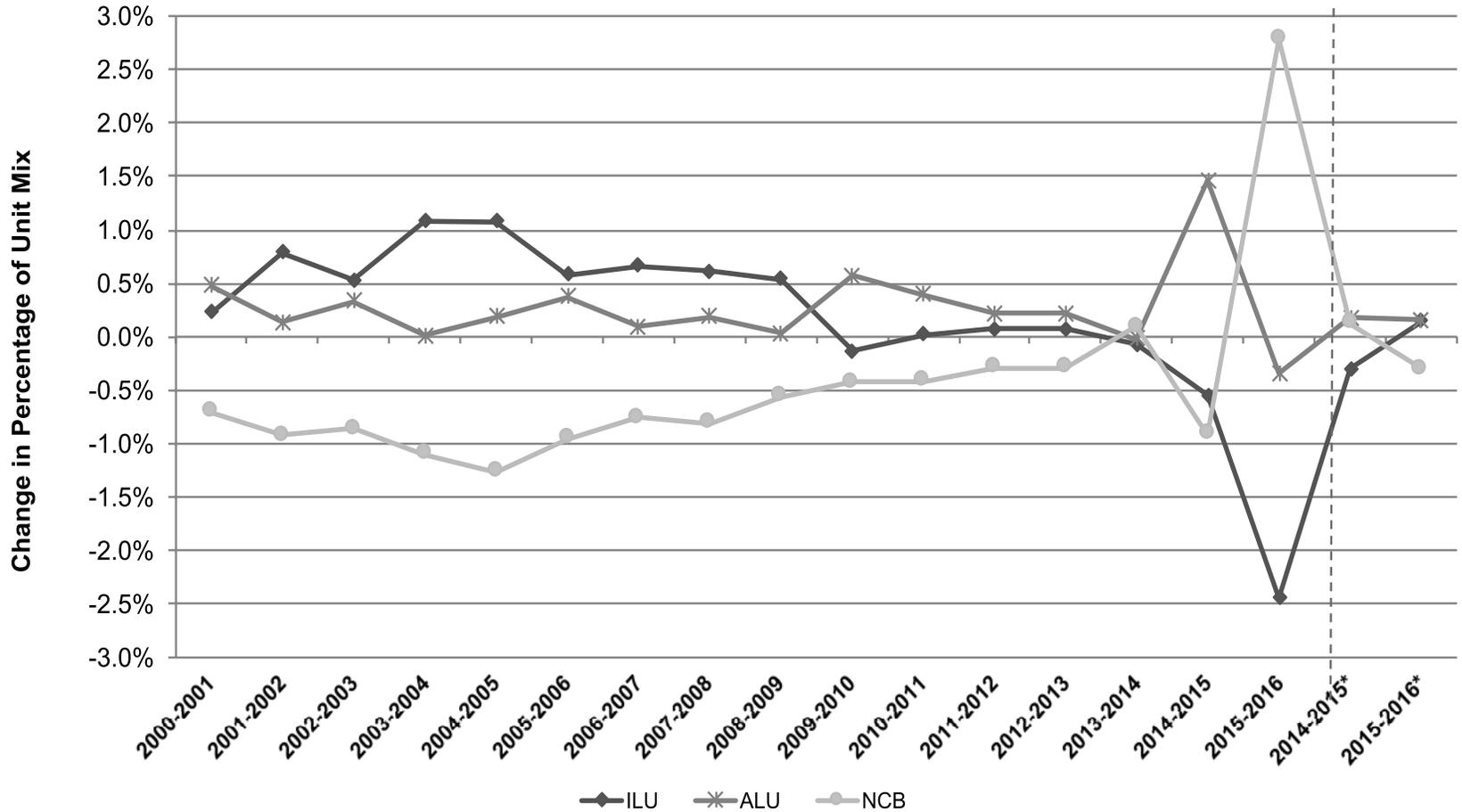


*Reflects change from 100 to 150 with the 2014 publication

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1f PERCENTAGE CHANGE IN UNIT MIX, 2000 THROUGH 2016 FOR 2017 LZ 150

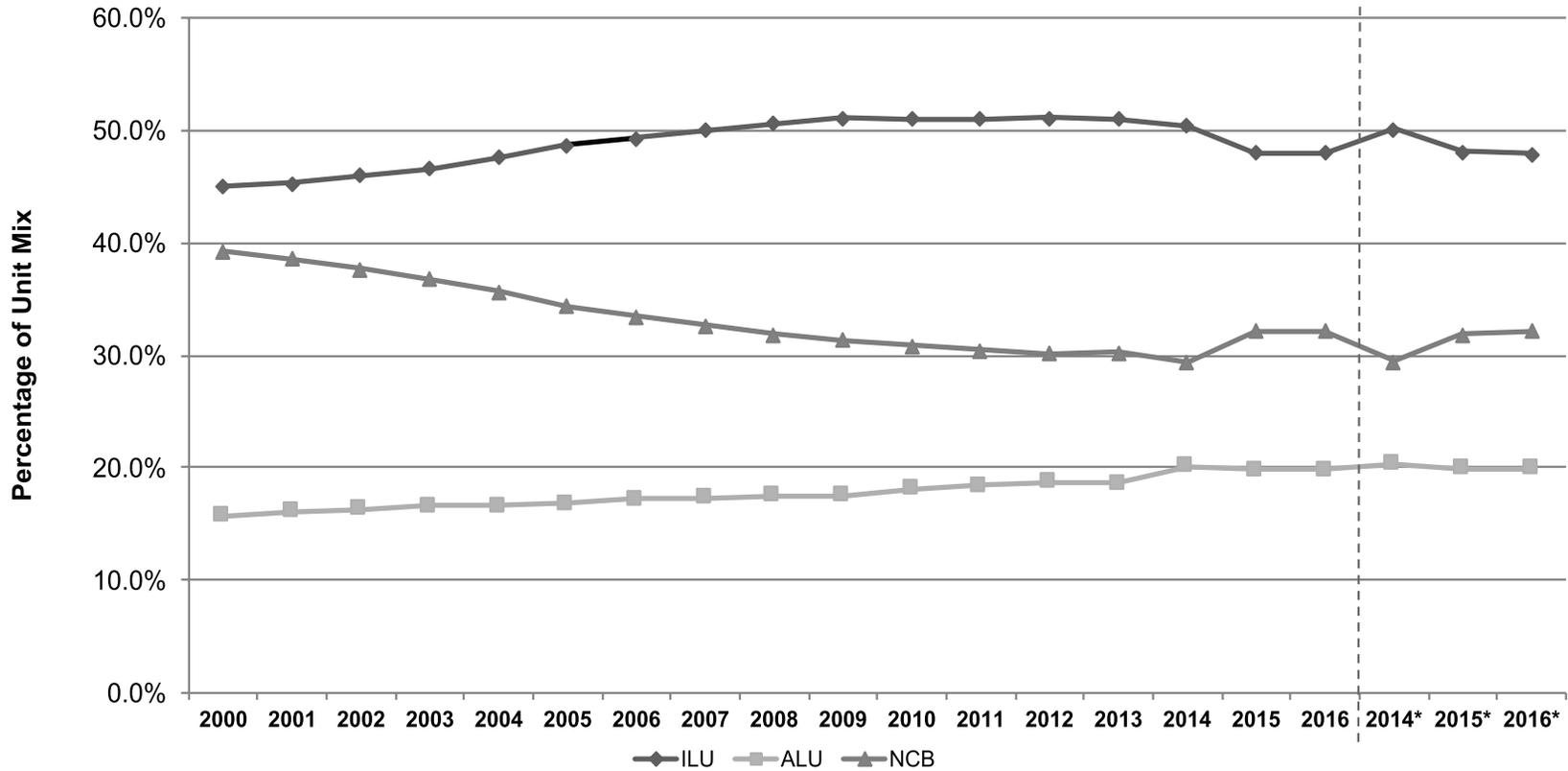


*Reflects change from 100 to 150 with the 2014 publication

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1g YEAR OVER YEAR CHANGE IN PERCENTAGE OF UNIT MIX, 2000 THROUGH 2016, FOR 2017 LZ 150

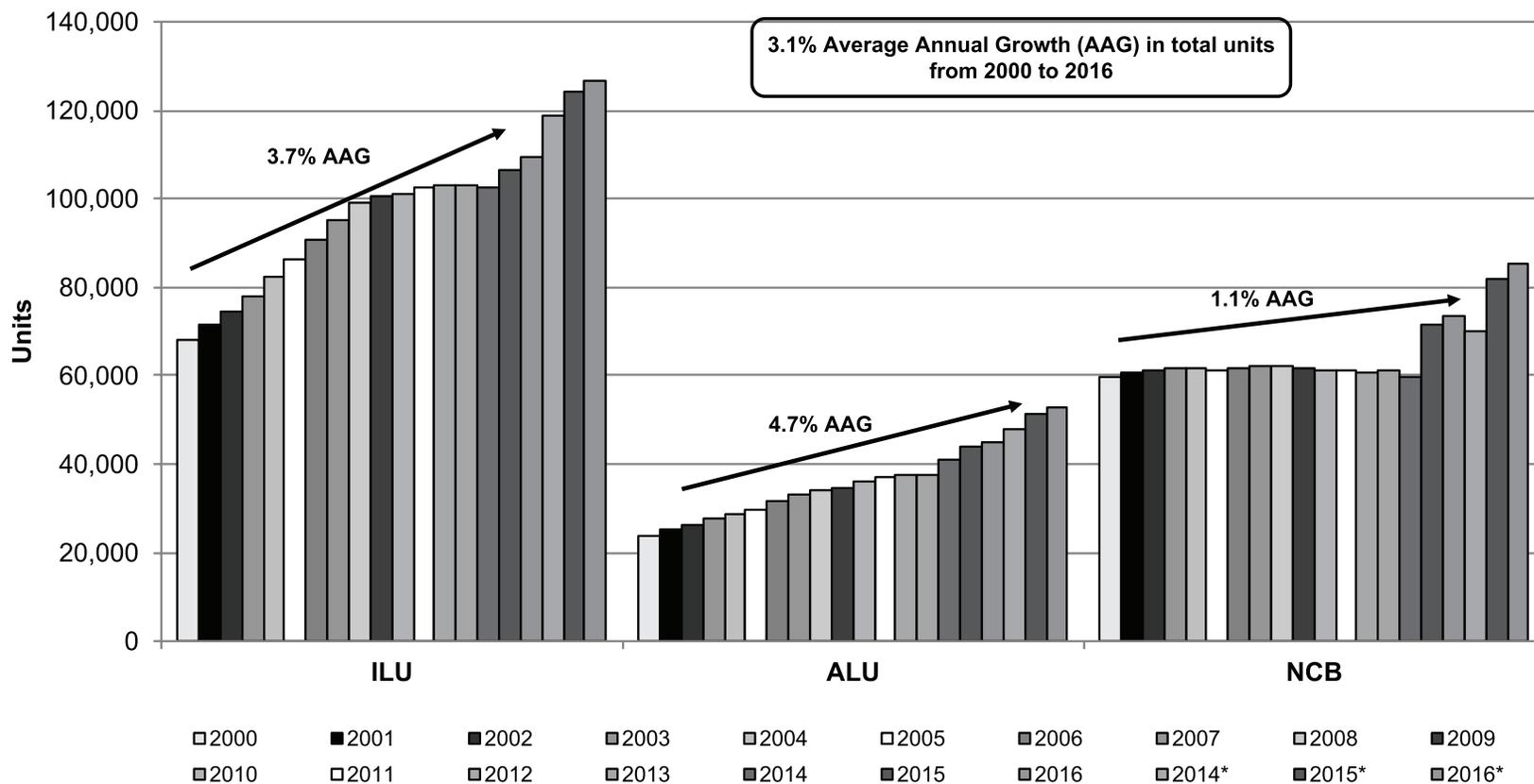


*Reflects change from 100 to 150 with the 2014 publication

4-1 2017 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1h UNIT TYPE COMPARISON, BY UNITS, 2000 THROUGH 2016 FOR 2017 LZ 150



*Reflects change from 100 to 150 with the 2014 publication

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2015 to 2016
				2016 Communities					2015 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
1	1	National Senior Campuses	MD	16	16	0	0	0	15	15	0	0	0	1
2	2	The Evangelical Lutheran Good Samaritan Society	SD	168	67	8	8	85	168	69	8	8	83	0
3	3	ACTS Retirement Services, Inc.	PA	21	21	0	0	0	21	21	0	0	0	0
4	4	Presbyterian Homes & Services	MN	43	13	23	4	3	42	12	23	4	3	1
5	5	Benedictine Health System	MN	39	24	1	5	9	39	24	1	5	9	0
6	6	Covenant Retirement Communities	IL	18	14	1	2	1	18	14	1	2	1	0
7	15	HumanGood fka Cornerstone (ABHOW & be.group)	CA	19	17	1	1	0	12	12	0	0	0	7
8	7	Ascension Senior Living	MO	27	8	2	2	15	26	8	2	2	14	1
9	10	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	22	6	4	1	11	20	5	4	1	10	2
10	8	Retirement Housing Foundation	CA	18	9	8	1	0	18	9	8	1	0	0
11	9	Lifespace Communities, Inc.	IA	12	12	0	0	0	12	12	0	0	0	0
12	11	The Kendal Corporation	PA	15	13	2	0	0	15	13	2	0	0	0
13	14	Lutheran Senior Services	MO	11	8	0	1	2	11	8	0	1	2	0
14	13	Presbyterian Senior Living	PA	20	12	6	2	0	20	12	6	2	0	0
15	18	Asbury Communities	MD	8	7	0	0	1	6	5	0	0	1	2
16	12	Presence Life Connections	IL	22	6	0	0	16	21	6	1	0	14	1
17	16	Westminster Communities of Florida	FL	9	9	0	0	0	9	9	0	0	0	0
18	NR	The Carmelite System, Inc.	NY	17	0	1	2	14	0	0	0	0	0	N/A
19	17	Ohio Living fka Ohio Presbyterian Retirement Services	OH	12	12	0	0	0	12	12	0	0	0	0
20	19	Pacific Retirement Services, Inc.	OR	9	8	1	0	0	9	8	1	0	0	0
21	20	Front Porch Communities and Services	CA	10	5	5	0	0	10	5	5	0	0	0
22	24	Volunteers of America	VA	25	4	3	9	9	25	4	3	9	9	0
23	22	Masonic Villages of the Grand Lodge of Pennsylvania	PA	5	3	1	0	1	5	3	1	0	1	0
24	23	Diakon Lutheran Social Ministries	PA	9	9	0	0	0	9	9	0	0	0	0
25	25	Ecumen	MN	32	0	5	20	7	36	0	4	24	8	-4

NR: Not ranked in that year

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2015 to 2016
				2016 Communities					2015 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
26	21	Presbyterian Manors of Mid-America, Inc.	KS	17	16	0	1	0	18	16	0	1	1	-1
27	29	Springpoint Senior Living Inc.	NJ	7	7	0	0	0	6	6	0	0	0	1
28	26	Christian Homes, Inc.	MO	13	11	0	1	1	13	11	0	1	1	0
29	27	Shell Point Retirement Community	FL	2	2	0	0	0	2	2	0	0	0	0
30	31	Augustana Care	MN	22	0	0	15	7	18	0	0	12	6	4
31	36	Christian Care Companies	AZ	5	1	3	1	0	5	1	3	1	0	0
32	32	Otterbein Senior Lifestyle Choices	OH	14	6	0	0	8	13	5	0	0	8	1
33	28	Willow Valley Communities	PA	3	3	0	0	0	3	3	0	0	0	0
34	30	Franciscan Communities, Inc.	IL	8	4	1	3	0	8	4	1	3	0	0
35	33	Concordia Lutheran Ministries	PA	12	5	0	6	1	12	5	0	6	1	0
36	35	Senior Quality Lifestyle Corporation	TX	6	6	0	0	0	6	6	0	0	0	0
37	34	National Church Residences	OH	12	5	2	4	1	12	5	2	4	1	0
38	39	ArchCare	NY	6	0	0	1	5	9	0	0	4	5	-3
39	37	Greencroft Communities	IN	8	7	1	0	0	8	7	1	0	0	0
40	42	Providence Life Services	IL	9	1	4	1	3	8	3	2	1	2	1
41	40	Elim Care, Inc.	MN	24	0	4	9	11	24	0	4	9	11	0
42	41	Homewood Retirement Centers	MD	5	4	1	0	0	5	4	1	0	0	0
43	44	Bethesda Health Group, Inc.	MO	11	0	7	0	4	10	0	6	0	4	1
44	43	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	7	7	0	0	0	7	4	0	2	1	0
45	38	Hebrew SeniorLife, Inc.	MA	4	2	1	0	1	4	2	1	0	1	0
46	46	Episcopal Senior Communities	CA	6	6	0	0	0	6	6	0	0	0	0
47	51	Lutheran Life Communities	IL	6	6	0	0	0	6	6	0	0	0	0
48	135	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	11	2	6	3	0	4	3	1	0	0	7
49	49	Bethesda Senior Living Communities	CO	18	0	2	16	0	16	0	2	14	0	2
50	47	Loretto	NY	8	1	2	4	1	8	1	2	4	1	0

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2015 VS. 2014)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2015 to 2016
				2016 Communities					2015 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
51	48	Magnolia Manor	GA	8	2	4	1	1	8	2	4	1	1	0
52	50	Covenant Health, Inc.	MA	12	0	0	4	8	12	0	0	4	8	0
53	54	WesleyLife	IA	7	7	0	0	0	7	7	0	0	0	0
54	56	Presbyterian Homes	IL	5	3	1	1	0	5	3	1	1	0	0
56	55	Holland Home	MI	4	2	0	1	1	4	2	0	1	1	0
55	53	Mississippi Methodist Senior Services, Inc.	MS	12	2	8	0	2	12	3	8	0	2	0
57	67	United Church Homes, Inc.	OH	10	6	1	0	3	9	5	1	0	3	1
58	60	Baptist Village Communities	OK	9	3	5	1	0	8	3	5	0	0	1
59	52	Buckner Retirement Services, Inc.	TX	5	5	0	0	0	7	5	2	0	0	-2
60	64	Phoebe Ministries	PA	4	4	0	0	0	4	4	0	0	0	0
61	57	Eskaton	CA	13	1	1	8	3	12	2	2	5	3	1
62	59	SantaFe Senior Living, Inc.	FL	3	3	0	0	0	3	3	0	0	0	0
63	61	Masonicare	CT	5	1	1	1	2	5	1	1	1	2	0
64	65	Lutheran Services Carolinas, Inc.	NC	9	1	1	1	6	9	1	1	1	6	0
65	63	Wesley Enhanced Living	PA	6	5	0	1	0	6	5	0	1	0	0
66	62	Friendship Senior Options	IL	2	2	0	0	0	2	2	0	0	0	0
67	66	Virginia United Methodist Homes, Inc.	VA	7	6	0	1	0	7	6	0	1	0	0
68	69	SpiriTrust Lutheran	PA	6	6	0	0	0	6	6	0	0	0	0
69	68	American Baptist Homes of the Midwest	MN	8	4	1	2	1	8	4	1	2	1	0
70	104	Presbyterian Villages of Michigan	MI	9	1	7	1	0	7	1	6	0	0	2
71	71	BHI Senior Living, Inc.	IN	4	4	0	0	0	4	4	0	0	0	0
72	70	LifeSpire of Virginia fka Virginia Baptist Homes, Inc.	VA	4	4	0	0	0	4	4	0	0	0	0
73	72	Integrace	MD	4	3	0	1	0	4	3	0	1	0	0
74	74	Lutheran SeniorLife	PA	7	2	5	0	0	7	2	5	0	0	0
75	75	Lutheran Homes of South Carolina, Inc.	SC	5	5	0	0	0	5	5	0	0	0	0

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2015 to 2016
				2016 Communities					2015 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
76	78	Eventide	MN	6	5	0	1	0	6	1	1	3	1	0
77	76	Northern California Presbyterian Homes & Services	CA	4	3	1	0	0	4	3	1	0	0	0
78	77	United Methodist Homes	NY	4	3	0	1	0	4	3	0	1	0	0
79	79	Walker Methodist	MN	6	1	4	1	0	6	1	4	1	0	0
80	80	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	5	1	0	4	0	5	1	0	4	0	0
81	82	Blue Skies of Texas	TX	2	2	0	0	0	2	2	0	0	0	0
82	81	Elant	NY	6	1	0	1	4	6	1	0	1	4	0
83	83	Methodist Retirement Communities	TX	5	4	0	1	0	5	5	0	0	0	0
84	84	The Presbyterian Homes, Inc.	NC	3	0	3	0	0	3	3	0	0	0	0
85	85	United Church Homes and Services	NC	3	3	0	0	0	3	3	0	0	0	0
86	127	Saint Therese	MN	5	3	0	1	1	3	2	0	1	0	2
87	87	The United Methodist Retirement Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
88	86	Presby's Inspired Life	PA	4	2	0	1	1	4	2	0	1	1	0
89	88	Menno Haven	PA	3	2	1	0	0	3	2	1	0	0	0
90	94	Oakwood Lutheran Senior Ministries	WI	2	2	0	0	0	2	2	0	0	0	0
91	89	Vista Prairie Communities	MN	10	0	0	10	0	10	0	0	10	0	0
92	90	Liberty Lutheran Services	PA	4	3	0	1	0	4	3	0	1	0	0
93	95	Presbyterian Communities of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
94	91	Morningside Ministries	TX	3	3	0	0	0	3	3	0	0	0	0
95	92	VMP	WI	2	2	0	0	0	2	2	0	0	0	0
96	93	Ingleside fka Westminster Ingleside Retirement Communities	DC	3	3	0	0	0	3	3	0	0	0	0
97	98	St. Ann's Community	NY	2	2	0	0	0	2	2	0	0	0	0
98	99	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
99	100	Sun Health Senior Living, LLC	AZ	3	3	0	0	0	3	3	0	0	0	0
100	109	Western Home Communities	IA	3	1	2	0	0	3	1	2	0	0	0

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2015 to 2016
				2016 Communities					2015 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
101	101	Presbyterian Communities and Services	TX	2	2	0	0	0	2	2	0	0	0	0
102	106	Givens Estates	NC	2	2	0	0	0	2	2	0	0	0	0
104	45	The New Jewish Home fka Jewish Home Lifecare	NY	3	0	1	0	2	4	0	1	0	3	N/A
103	NR	Carroll Lutheran Village/The Lutheran Village at Miller's Grant	MD	2	2	0	0	0	1	1	0	0	0	1
105	116	Christian Care Centers, Inc.	TX	3	3	0	0	0	2	2	0	0	0	1
106	96	Cedar Community	WI	6	1	2	2	1	6	1	2	2	1	0
107	103	Goodwin House Incorporated	VA	2	2	0	0	0	2	2	0	0	0	0
108	105	Los Angeles Jewish Home	CA	3	1	1	0	1	3	1	1	0	1	0
109	122	National Lutheran Inc. fka National Lutheran Home for the Aged	MD	3	2	1	0	0	3	2	0	1	0	0
110	117	Christian Living Communities	CO	4	3	0	1	0	3	3	0	0	0	1
111	107	Luthericare	PA	3	2	0	0	1	3	2	0	0	1	0
112	102	Simpson Senior Services	PA	3	3	0	0	0	3	3	0	0	0	0
113	NR	Haverland Carter Lifestyle Group	NM	3	2	0	1	0	0	0	0	0	0	N/A
114	119	Mather LifeWays	IL	3	2	1	0	0	3	2	1	0	0	0
115	108	Heritage Ministries	NY	9	1	3	2	3	9	1	3	2	3	0
117	120	Wellspring Lutheran Services	MI	11	1	3	2	5	10	1	3	2	4	1
116	110	The Ohio Masonic Home	OH	3	2	1	0	0	3	2	1	0	0	0
118	133	Lutheran Social Ministries of New Jersey, Inc.	NJ	3	1	0	0	2	2	1	0	0	1	1
119	112	Samaritas fka Lutheran Social Services of Michigan	MI	5	1	2	0	2	5	1	2	0	2	0
120	NR	Grace Inspired Ministries fka Lutheran Community at Telford & Rockhill Mennonite affiliation	PA	2	2	0	0	0	0	0	0	0	0	N/A
121	NR	United Church of Christ Homes	PA	6	4	2	0	0	0	0	0	0	0	N/A
123	73	United Methodist Memorial Home	IN	3	3	0	0	0	3	3	0	0	0	0
122	114	Wesley Willows	IL	2	1	1	0	0	2	1	0	0	0	0
124	111	Sunnyside Presbyterian Home	VA	3	3	0	0	0	3	3	0	0	0	0
125	115	Garden Spot Communities fka Garden Spot Village	PA	2	1	0	0	1	2	1	0	0	1	0

NR: Not ranked in that year

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2016 VS. 2015)

2017 Rank	2016 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2015 to 2016
				2016 Communities					2015 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
126	118	Landis Communities	PA	3	1	1	0	1	3	1	1	1	0	0
127	113	Life Enriching Communities	OH	2	2	0	0	0	2	2	0	0	0	0
128	NR	Amsterdam Continuing Care Health System, Inc.	NY	2	1	0	0	1	0	0	0	0	0	N/A
129	Next 50	The RiverWoods Group	NH	2	2	0	0	0	3	3	0	0	0	-1
130	121	Luther Manor	WI	2	1	0	1	0	2	1	0	1	0	0
131	124	Methodist ElderCare Services fka Methodist ElderCare	OH	3	1	2	0	0	3	1	2	0	0	0
132	130	Wesley Homes	WA	2	2	0	0	0	2	2	0	0	0	0
133	123	Genacross Lutheran Services fka Lutheran Homes Society	OH	5	2	1	0	2	5	2	1	0	2	0
134	126	Sunset Retirement Communities and Services	MI	4	2	0	1	1	4	2	0	1	1	0
135	128	Messiah Lifeways	PA	2	1	1	0	0	2	1	1	0	0	0
136	136	Maple Knoll Communities, Inc.	OH	2	2	0	0	0	2	2	0	0	0	0
137	131	Christian Health Care Center	NJ	2	1	1	0	0	2	1	1	0	0	0
138	132	CRISTA Senior Living	WA	2	1	1	0	0	2	1	1	0	0	0
139	134	Vincentian Collaborative Services	PA	4	2	0	0	2	4	2	0	0	2	0
140	150	St. John's Lutheran Ministries	MT	5	4	0	1	0	5	4	1	0	0	0
141	137	LifeStream Complete Senior Living, Inc.	AZ	4	1	2	0	1	5	1	2	0	2	-1
142	148	Moorings Park	FL	2	2	0	0	0	2	1	1	0	0	0
143	Next 50	Elder Care Alliance	CA	5	1	1	3	0	4	1	0	3	0	1
144	141	Masonic Homes of Kentucky	KY	3	1	1	0	1	3	1	1	0	1	0
145	138	Albright Care Services	PA	2	2	0	0	0	2	2	0	0	0	0
146	139	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	4	2	1	0	1	4	2	1	0	1	0
147	129	Episcopal SeniorLife Communities	NY	9	1	4	3	1	9	1	4	3	1	0
148	132	LindenGrove Communities fka LindenGrove, Inc.	WI	4	0	0	0	4	4	0	0	0	4	0
149	142	The Loomis Communities	MA	4	4	0	0	0	4	3	1	0	0	0
150	NR	Bethany St. Joseph Corporation	WI	13	0	4	5	4	0	0	0	0	0	N/A
		TOTAL COMMUNITIES		1,301	632	190	192	287	1,225	609	174	180	262	34

NR: Not ranked in that year

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2b SUMMARY OF COMMUNITY MIX (BY LARGEST 10, 25, 50, 100 & 150)

Largest	LPC	IL	AL	NH	ALL	% as total of LZ 150
10	195	48	24	124	391	30%
25	303	72	58	174	607	47%
50	405	106	123	217	851	65%
100	546	152	170	250	1,117	86%
150	632	190	192	287	1,301	100%

Largest	2017 Total Communities	2016 Total Communities	Change in total communities	Percent change in total communities
10	391	379	12	3.1%
25	607	597	10	1.6%
50	851	821	30	3.5%
100	1,117	1,077	40	3.6%
150	1,301	1,253	48	3.7%

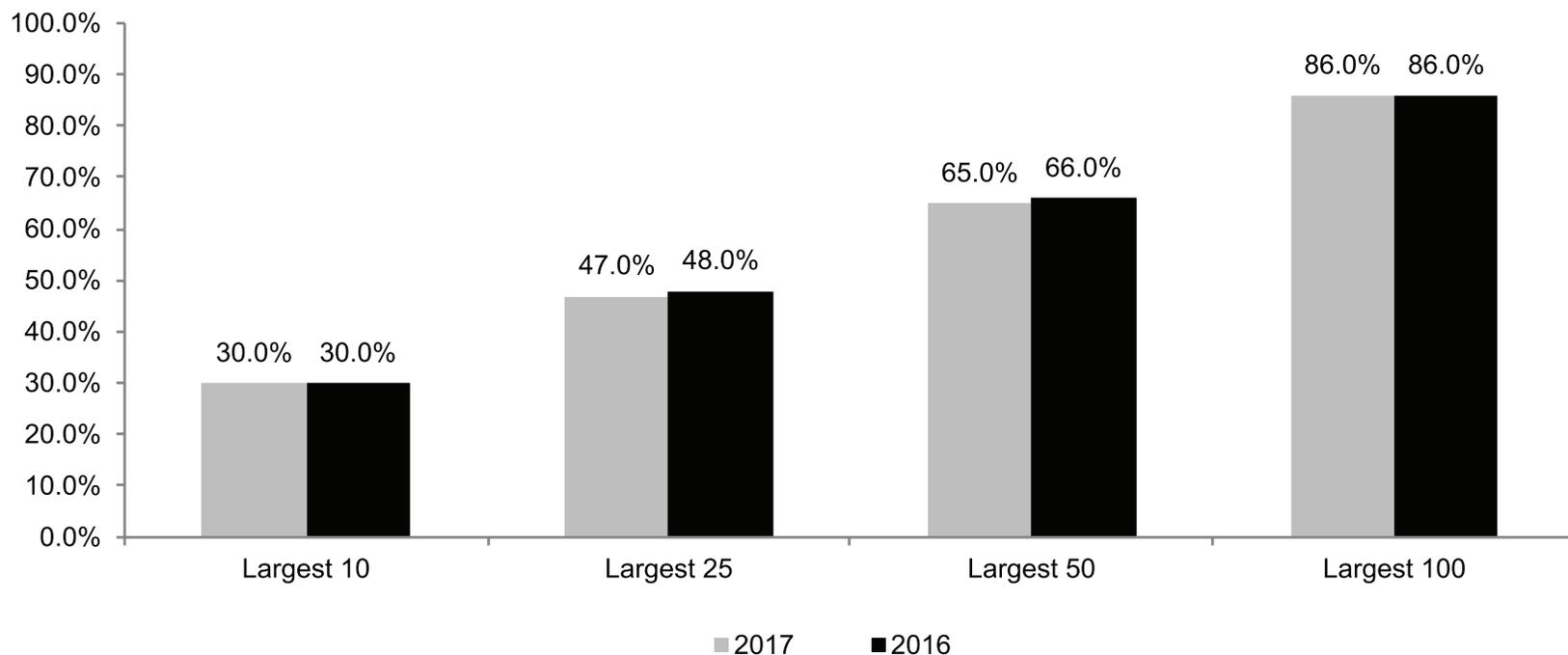
Analysis of Community Mix for Each Year's Respective LZ 150 Listing*					
	LPC	IL	AL	NH	ALL
2014 LZ 150					
2013 avg communities/system	5.1	1.4	1.6	1.5	9.5
% of total 150	53.2%	14.3%	17.3%	15.2%	100.0%
2015 LZ 150					
2014 avg communities/system	2.6	0.7	0.8	1.4	5.5
% of total 150	53.1%	14.0%	14.8%	18.1%	100.0%
2016 LZ 150					
2015 avg communities/system	4.2	1.2	1.3	1.7	8.4
% of total 150	50.0%	14.4%	14.9%	20.7%	100.0%
2017 LZ 150					
2016 avg communities/system	4.2	1.3	1.3	1.9	8.7
% of total 150	48.6%	14.6%	14.8%	22.1%	100.0%

*Note change from 100 to 150 with the 2014 publication

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

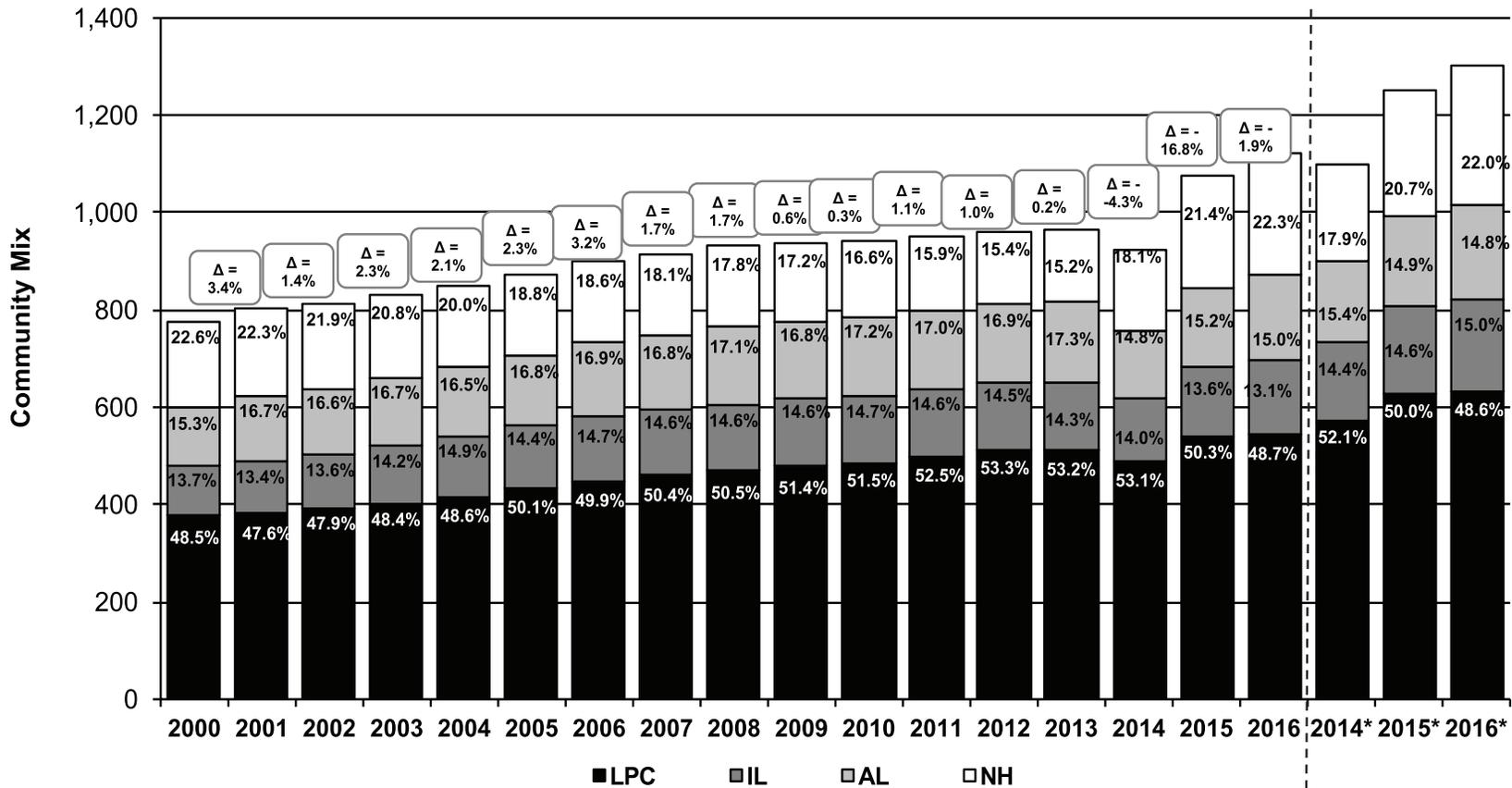
4-2c PERCENTAGE OF TOTAL COMMUNITIES OWNED (BY LARGEST 10, 25, 50, & 100)



4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2d TOTAL COMMUNITY MIX BY YEAR, BY TOTAL COMMUNITIES 2000 THROUGH 2016, FOR 2017 LZ 150



*Note change from 100 to 150 with the 2014 publication

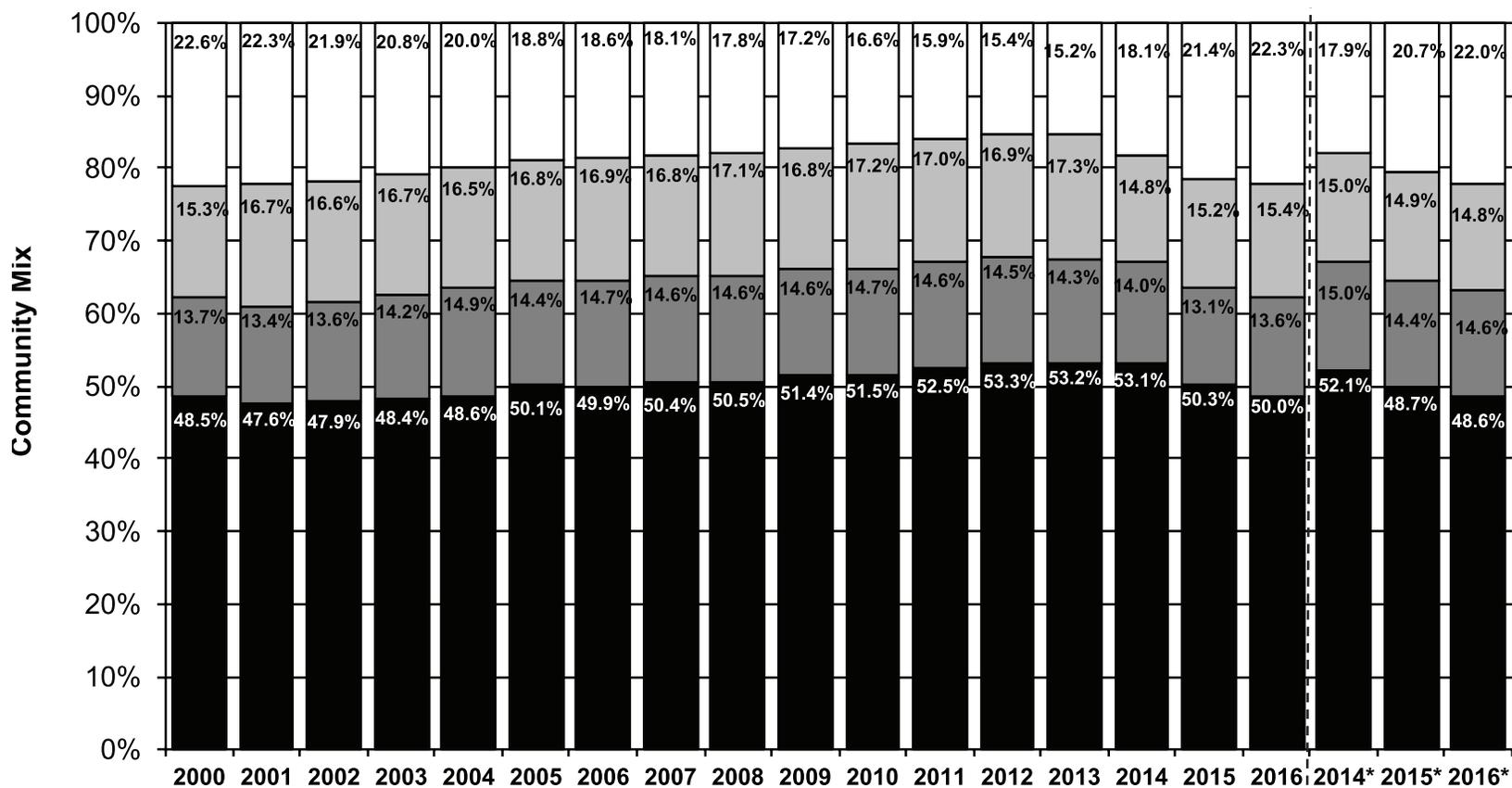
The percentage change (17.7%) from 2014-2015 is largely attributed to that year's inclusion of several large Catholic senior living organizations.

LeadingAge 150 Ziegler

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2e TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2016, FOR 2017 LZ 150

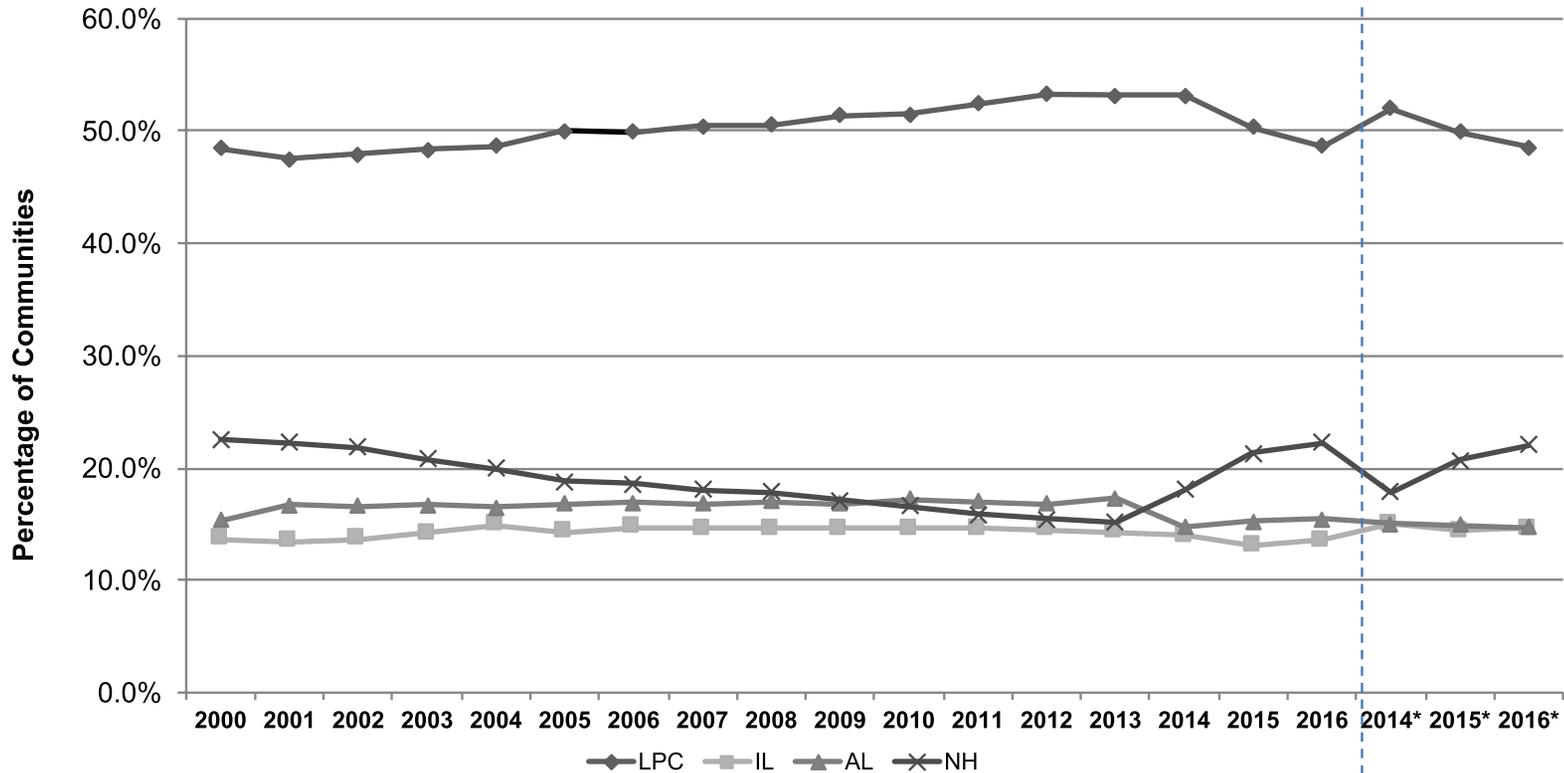


*Note change from 100 to 150 with the 2014 publication

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2f TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2016, FOR 2017 LZ 150

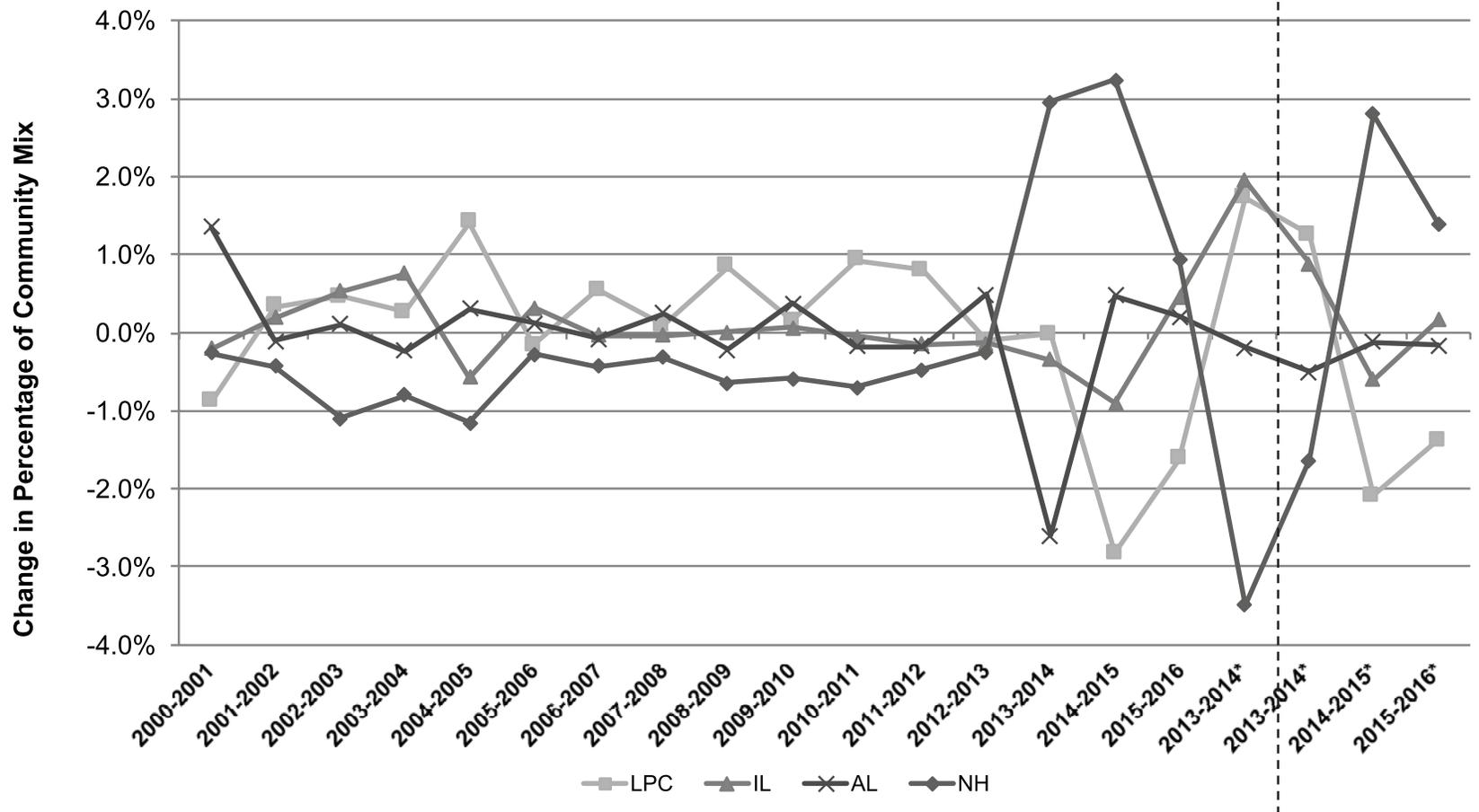


*Note change from 100 to 150 with the 2014 publication

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities

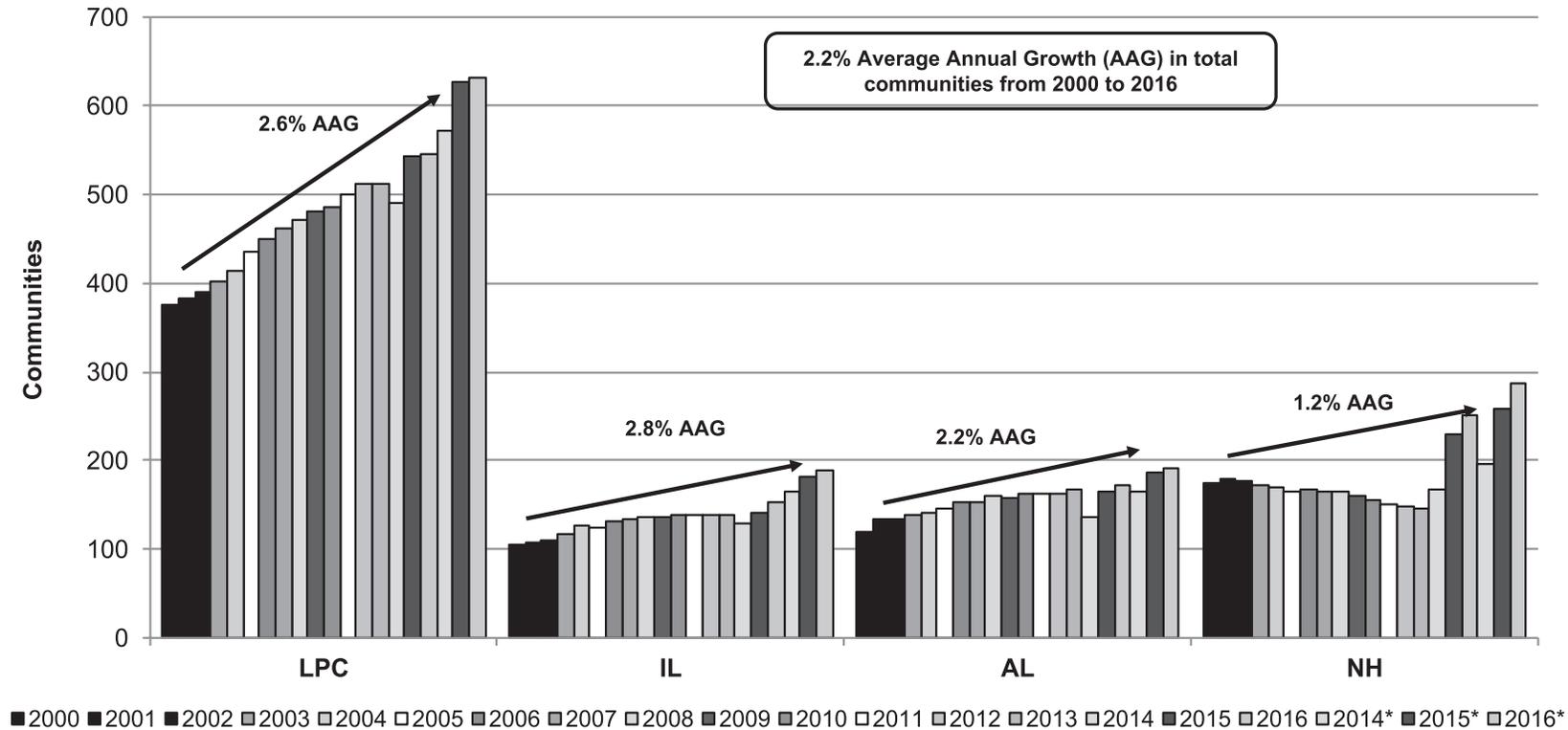
4-2g YEAR OVER YEAR CHANGE IN PERCENTAGE OF COMMUNITY MIX
2000 THROUGH 2016, FOR 2017 LZ 150



*Note change from 100 to 150 with the 2014 publication

4-2 2017 LeadingAge Ziegler 150

Organizational Characteristics: Communities
 4-2h COMMUNITY TYPE COMPARISON, BY COMMUNITY
 2000 THROUGH 2016, FOR 2017 LZ 150

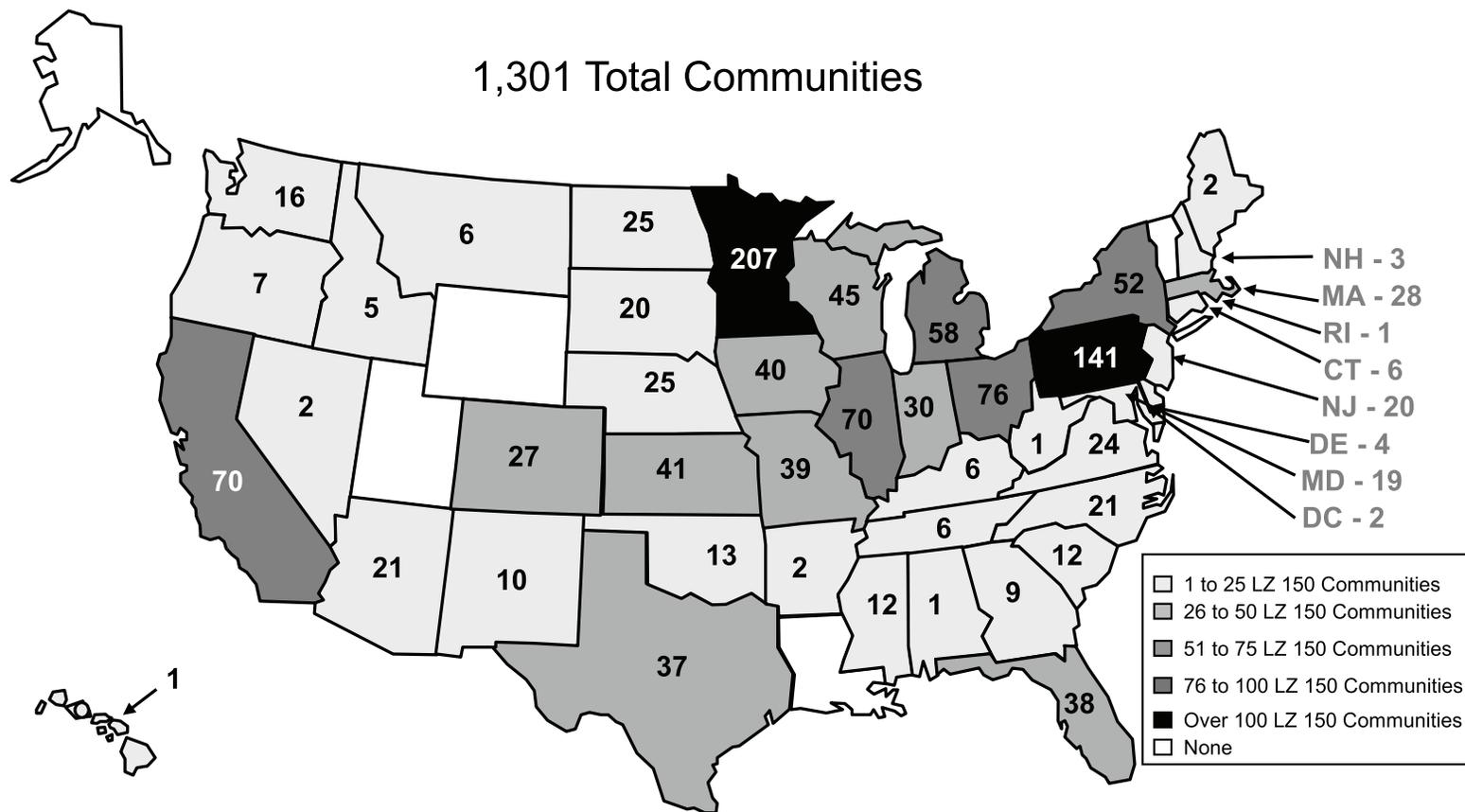


*Note change from 100 to 150 with the 2014 publication

4-3 2017 LeadingAge Ziegler 150

Organizational Characteristics: Locations

4-3a COMMUNITY LOCATIONS



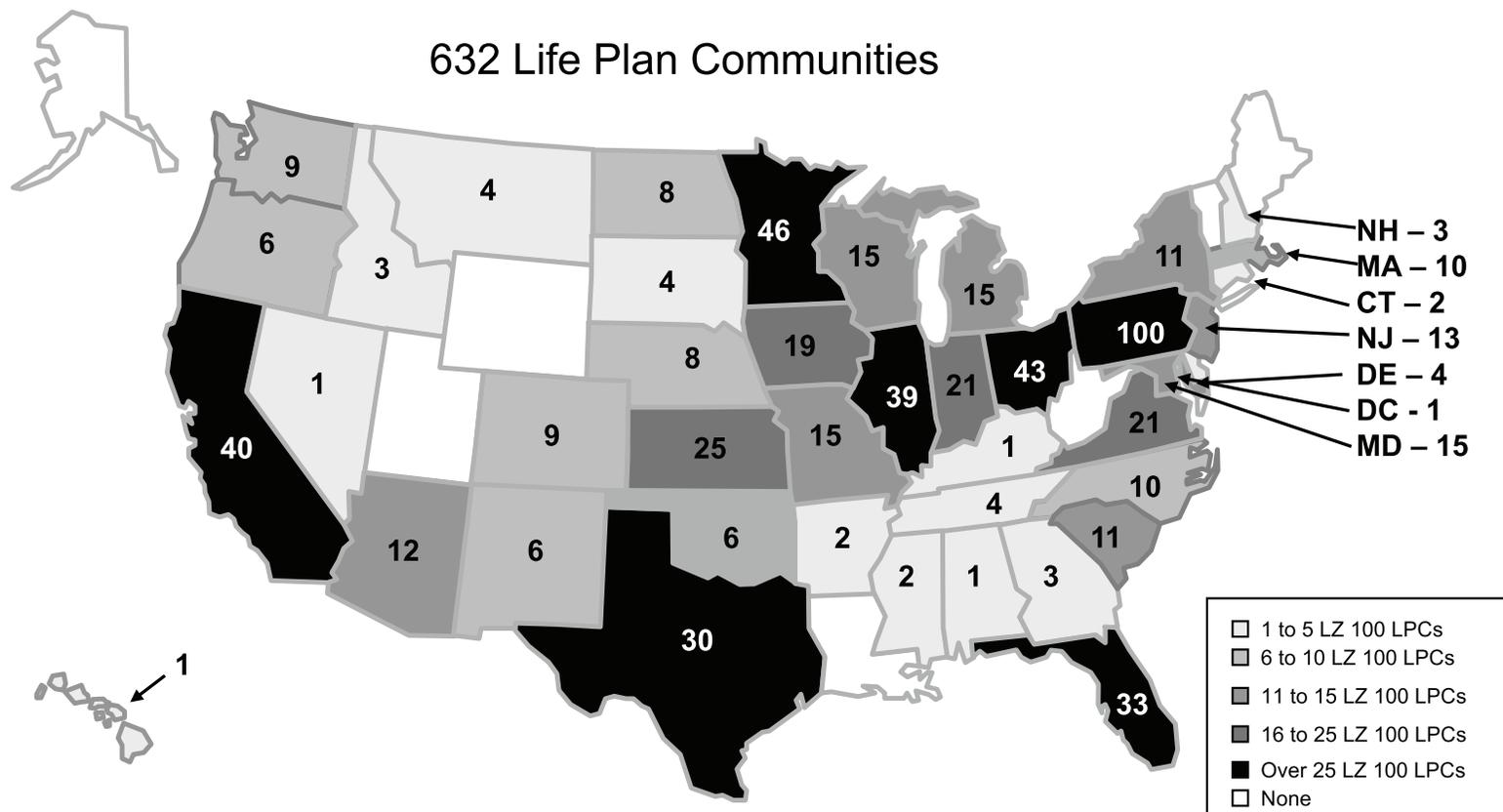
4-3 2017 LeadingAge Ziegler 150

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

LPC		ILF		ALF		NH	
1	PA 100	1	MN 41	1	MN 68	1	MN 52
2	MN 46	2	PA 18	2	PA 13	2	NY 22
3	OH 43	3	MI 18	3	CA 12	3	OH 20
4	CA 40	4	CA 13	4	NY 11	4	IL 20
5	IL 39	5	MO 11	5	CO 11	5	MI 18

4-3 2017 LeadingAge Ziegler 150

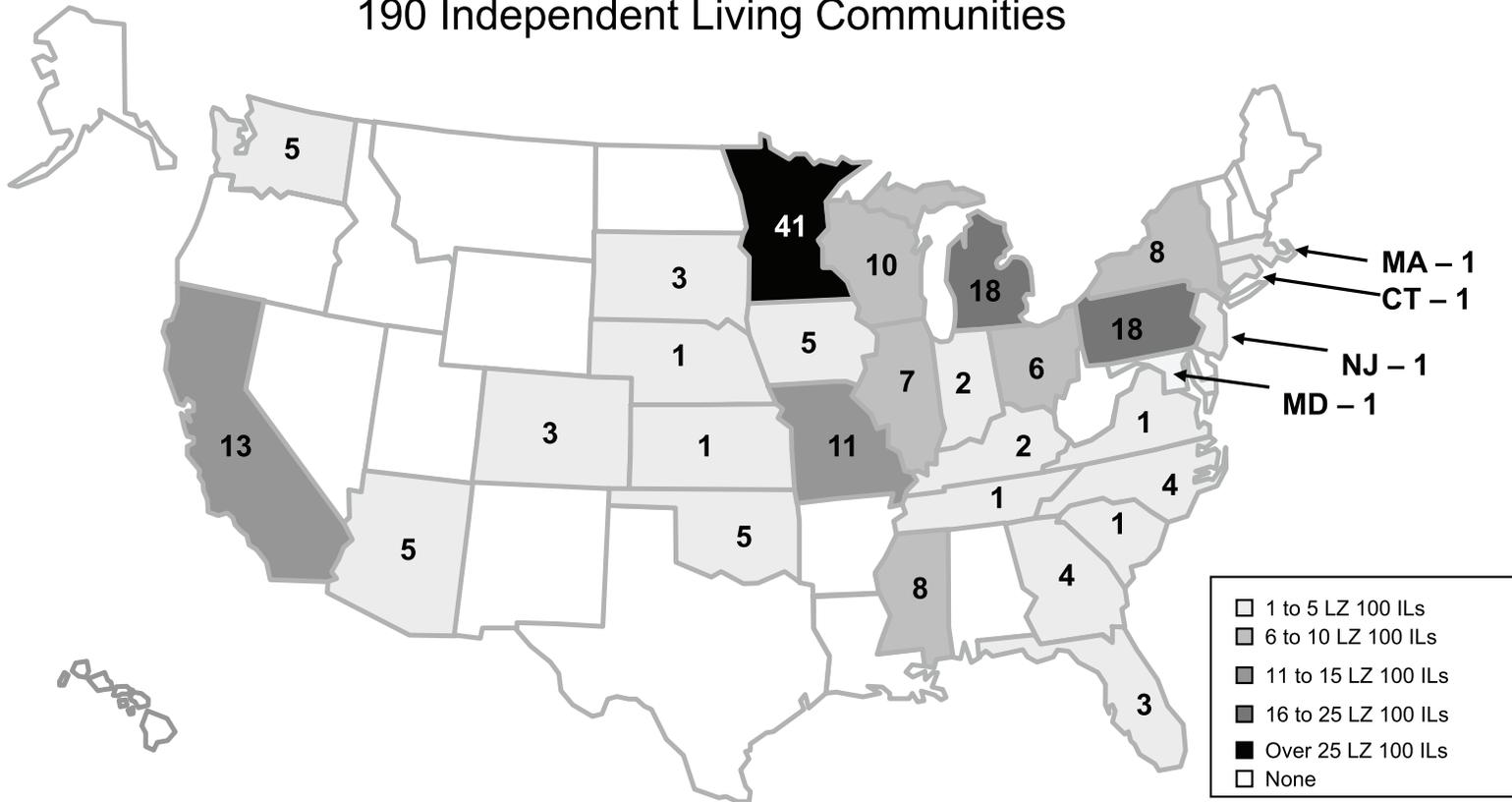
Organizational Characteristics: Locations
4-3c Life Plan Community (LPC) Locations



4-3 2017 LeadingAge Ziegler 150

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

190 Independent Living Communities



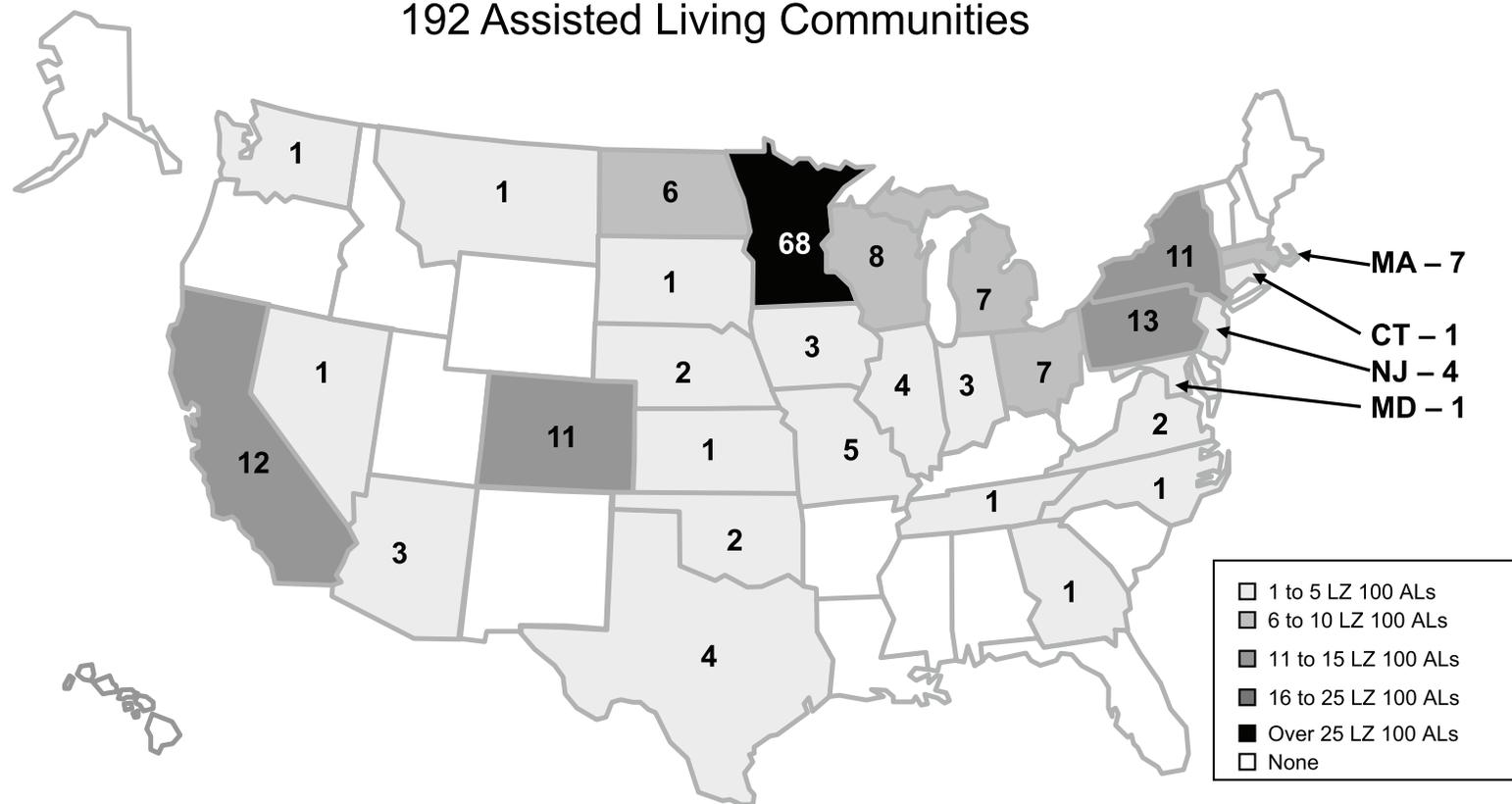
LeadingAge 150 Ziegler

4-3 2017 LeadingAge Ziegler 150

Organizational Characteristics: Locations

4-3e ASSISTED LIVING (AL) COMMUNITY LOCATIONS

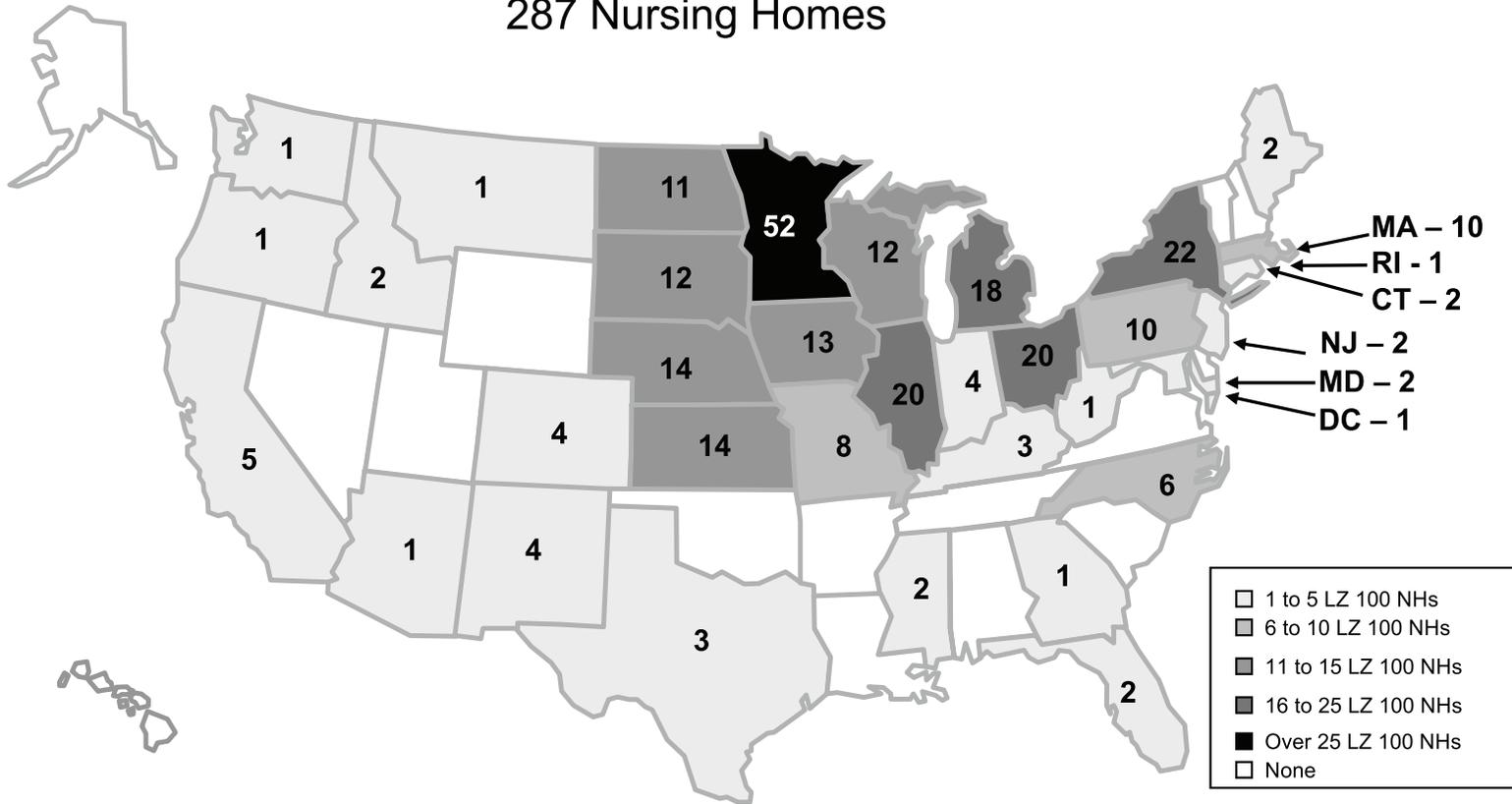
192 Assisted Living Communities



4-3 2017 LeadingAge Ziegler 150

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

287 Nursing Homes

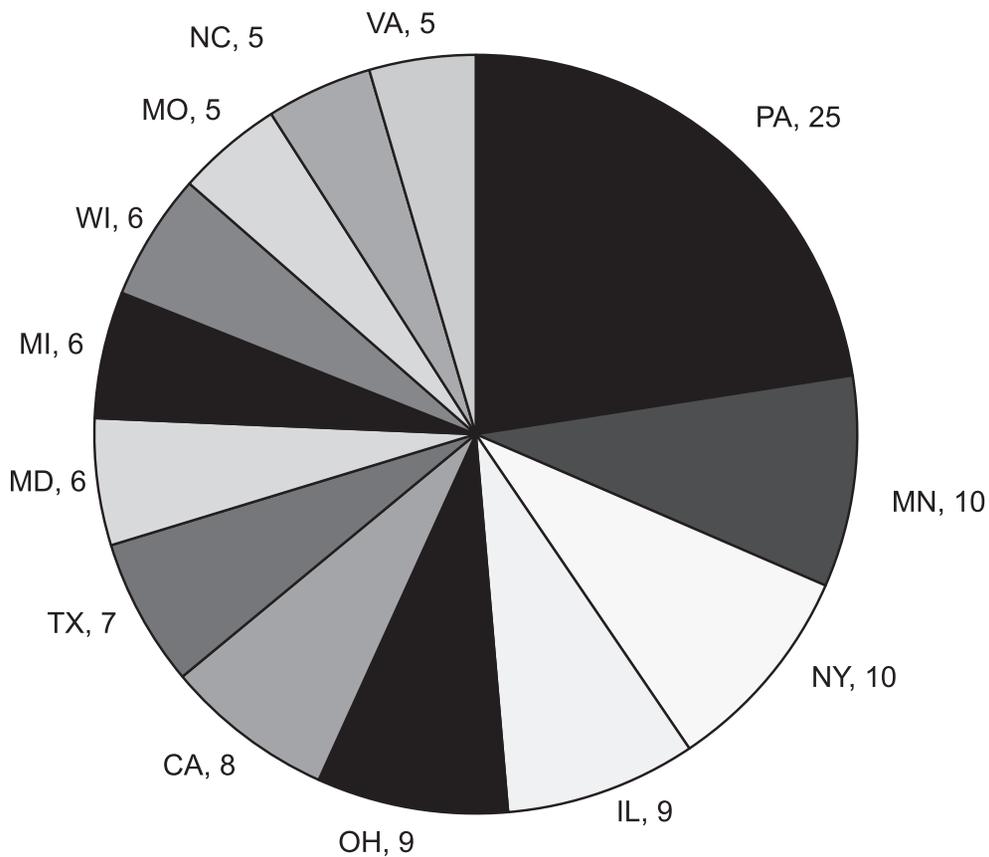


LeadingAge 150 Ziegler

4-4 2017 LeadingAge Ziegler 150

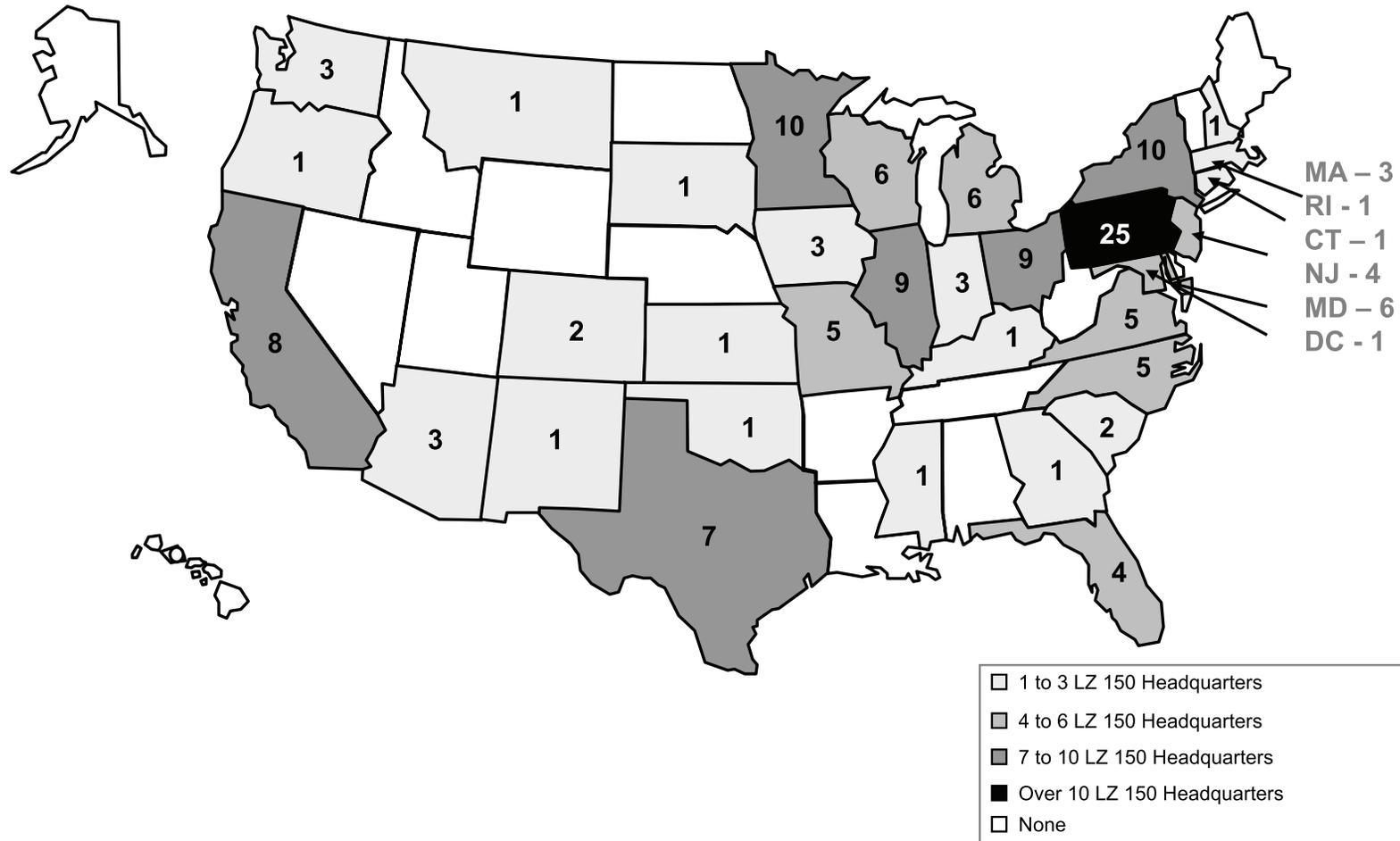
Organizational Characteristics: System Headquarters

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



4-4 2017 LeadingAge Ziegler 150

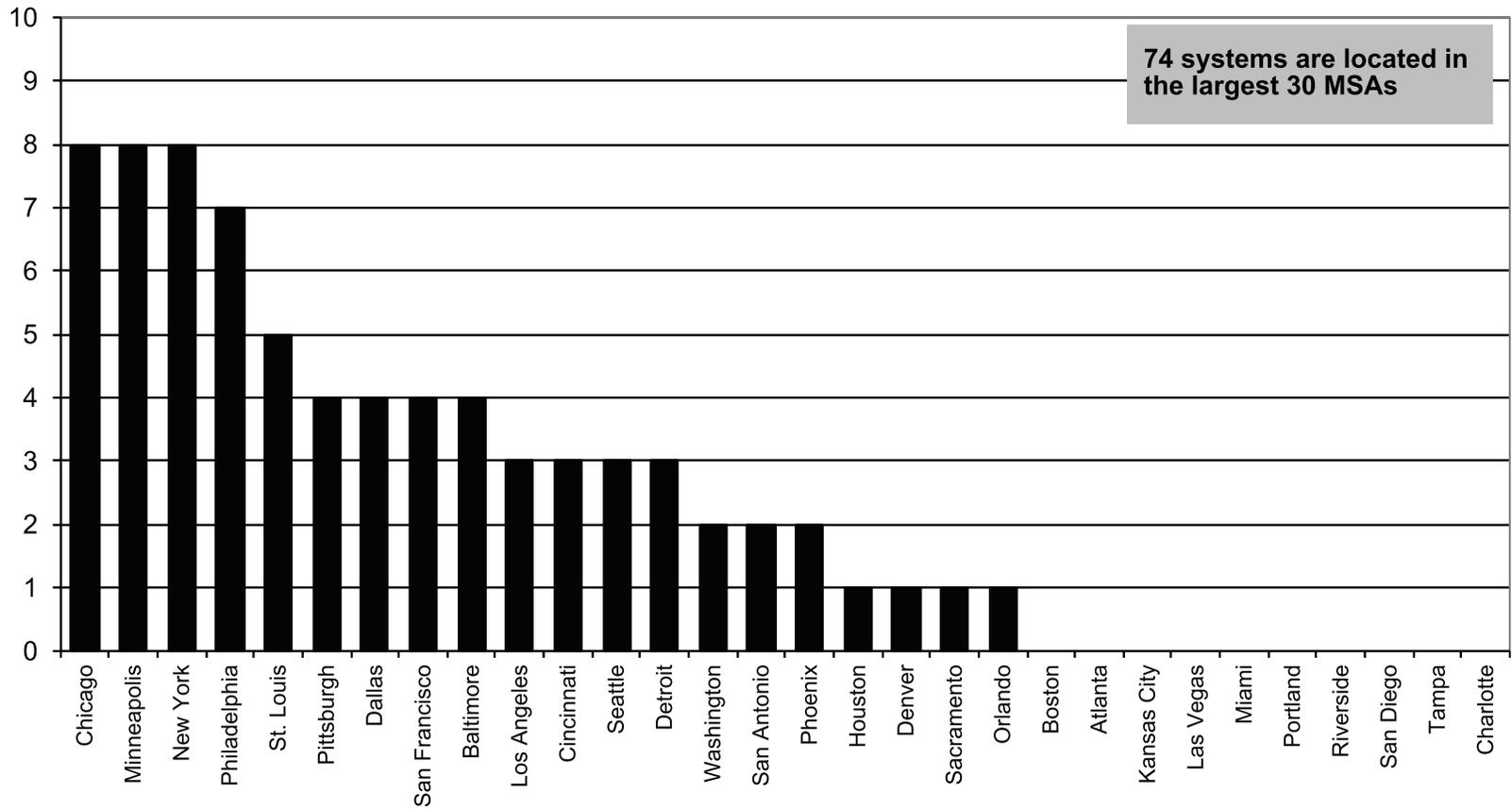
Organizational Characteristics: System Headquarters 4-4b HEADQUARTERS' LOCATIONS



4-5 2017 LeadingAge Ziegler 150

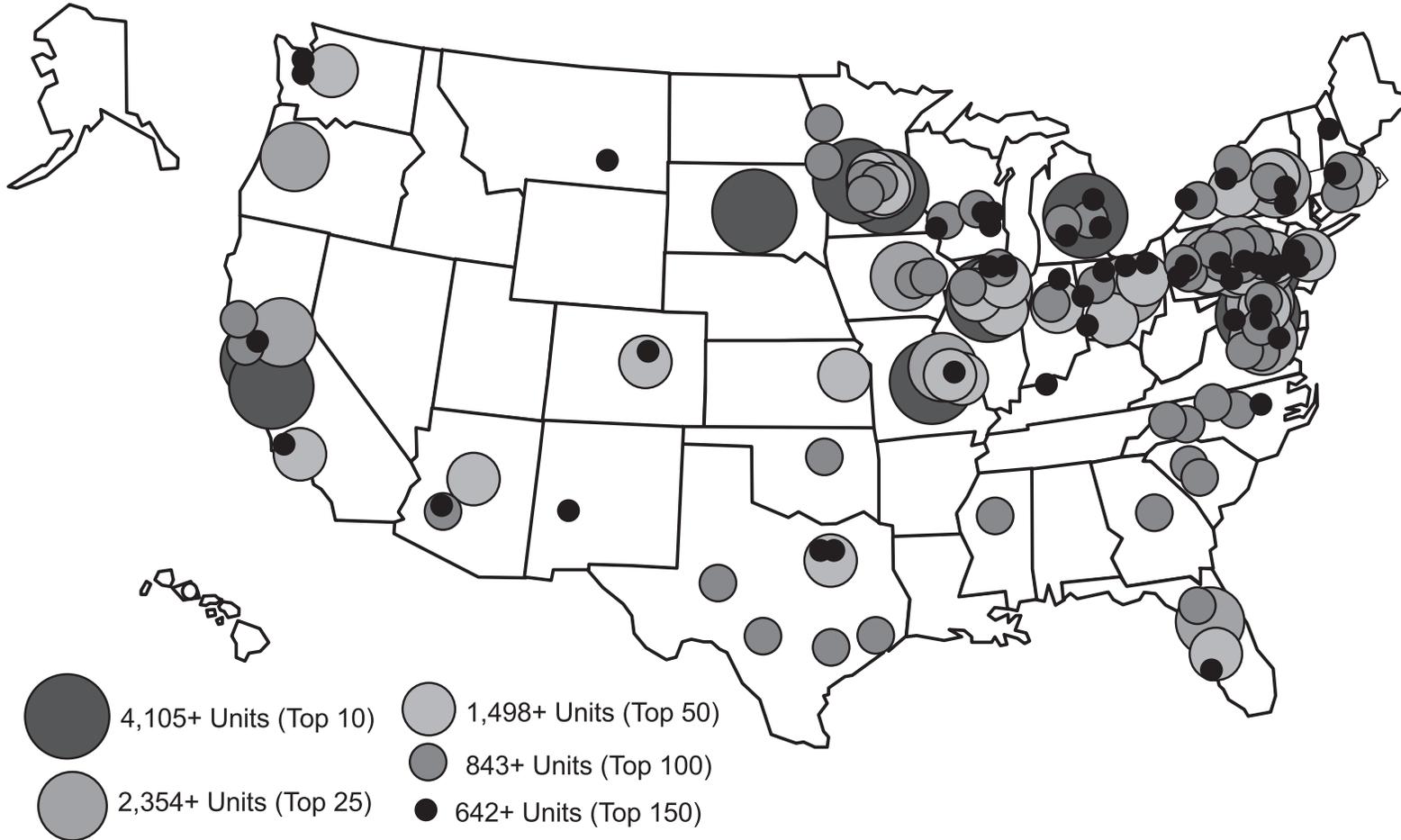
Organizational Characteristics: Metropolitan Statistical Areas (MSAs)

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



4-5 2017 LeadingAge Ziegler 150

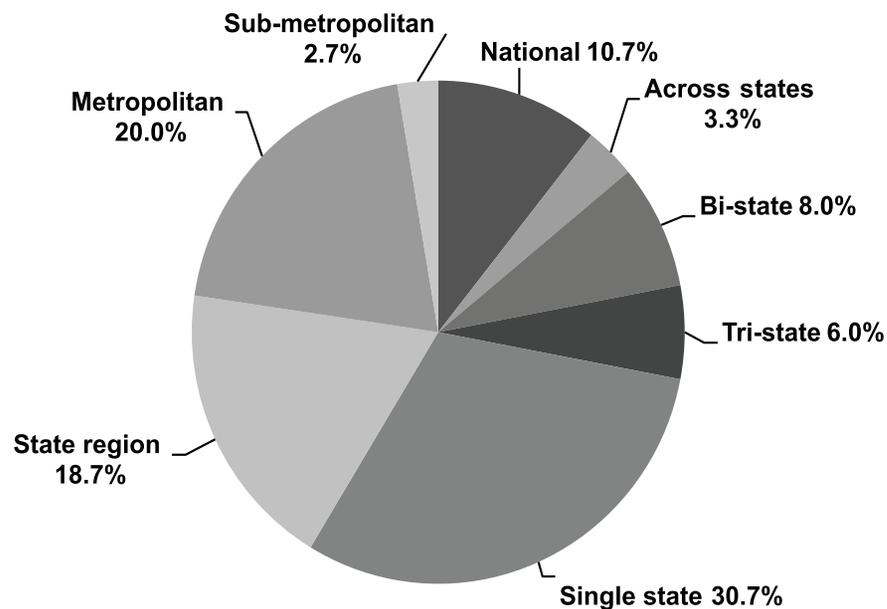
Organizational Characteristics: Metropolitan Statistical Areas (MSAs)
4-5b HEADQUARTERS' LOCATIONS BY SIZE



4-6 2017 LeadingAge Ziegler 150

Organizational Characteristics: Geographic Classifications

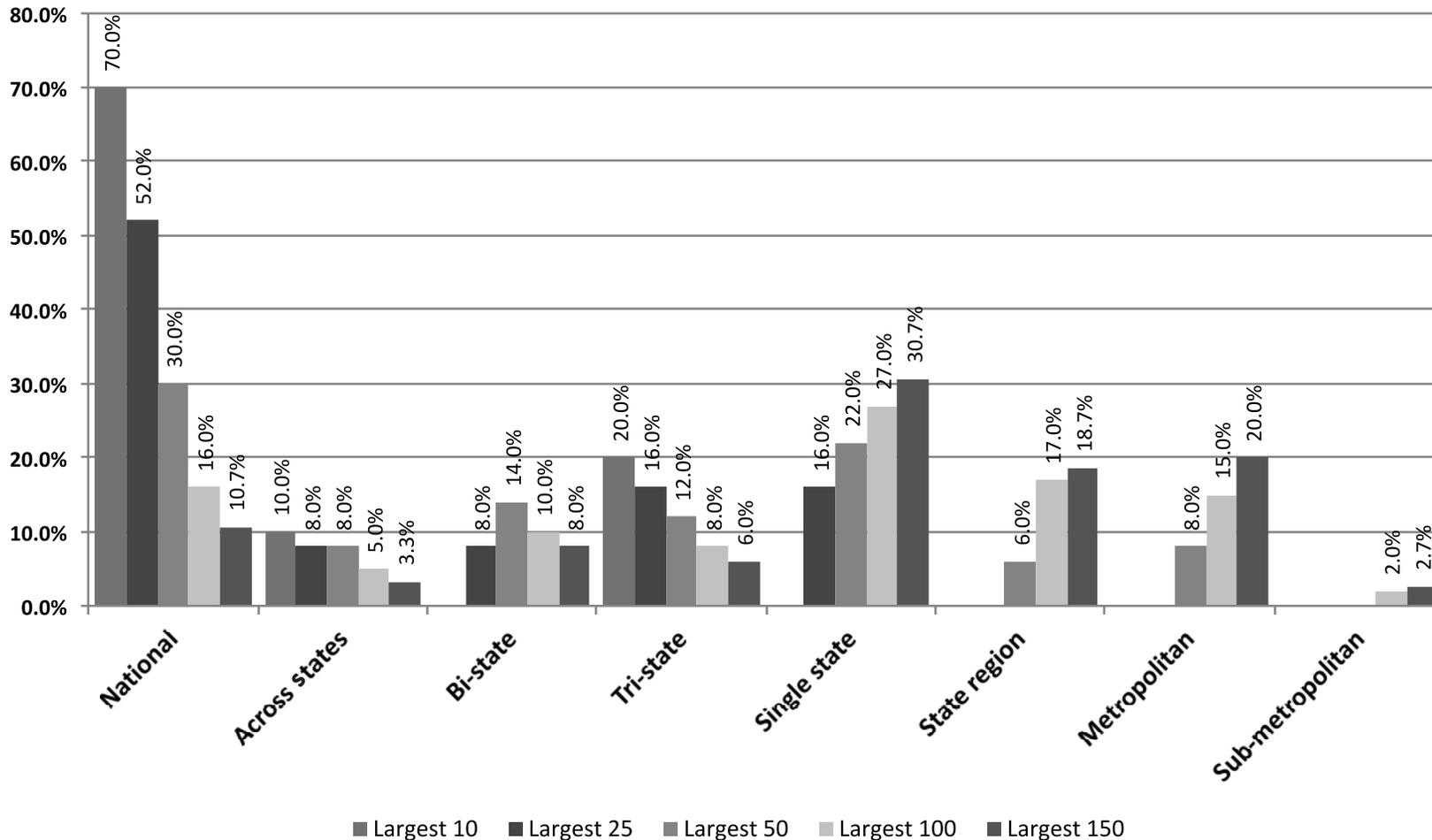
4-6a PRIMARY CLASSIFICATIONS



Primary Classification	Secondary Classification	# Organizations
National	Across states	4
	Bi-state	1
	Single state	4
Across states	Single state	3
	Metropolitan	1
Tri-state	Single state	5
	State region	1
Bi-state	Metropolitan	2
	Single state	3
	State region	4
Single state	Metropolitan	6
	State region	5
State region	Metropolitan	5
	Sub-metropolitan	1
Metropolitan	Sub-metropolitan	2
Total Organizations with Secondary Classifications:		53

4-6 2017 LeadingAge Ziegler 150

Organizational Characteristics: Geographic Classifications 4-6b PRIMARY CLASSIFICATIONS BY LARGEST, 10, 25, 50, 100 & 150



4-7 2017 LeadingAge Ziegler 150

Organizational Characteristics: Corporate Name Changes in 2016

2016 Rank	Current System Name	Logo	Previous System Name
7	HumanGood fka Cornerstone (ABHOW & be.group)		Cornerstone Affiliates (ABHOW) & be.group
9	Trinity Senior Living Communities		Trinity Health Senior Communities
19	Ohio Living		Ohio Presbyterian Retirement Services
44	Presbyterian SeniorCare Network		Presbyterian SeniorCare
48	Transforming Age		Presbyterian Retirement Communities Northwest
73	LifeSpire of Virginia		Virginia Baptist Homes
81	United Methodist Communities		The United Methodist Homes of New Jersey
96	Ingleside		Westminster Ingleside Retirement Communities
104	The New Jewish Home		Jewish Home Lifecare
119	Samaritas		Lutheran Social Services of Michigan
120	Grace Inspired Ministries	N/A	Lutheran Community at Telford & Rockhill Mennonite Community
124	Garden Spot Communities		Garden Spot Village
130	Methodist ElderCare Services		Methodist ElderCare
132	Genacross Lutheran Services		Lutheran Homes Society
145	St. Andrew's Resources for Seniors System		St. Andrew's Resources for Seniors
147	LindenGrove Communities		LindenGrove, Inc.

4-8 2017 LeadingAge Ziegler 150

Organizational Characteristics: Debt Ratings

4-8a LZ 150 WITH RATED DEBT AS OF 12/31/2016

2017 Rank	System Name	State	Rated	
			Fitch	S&P
35	Concordia Lutheran Ministries	PA	UNR	AA-
142	Moorings Park	FL	A+	A+
59	Buckner Retirement Services, Inc.	TX	A	UNR
11	Lifespace Communities, Inc.	IA	A	UNR
84	The Presbyterian Homes, Inc.	NC	A	UNR
33	Willow Valley Communities	PA	A	UNR
23	Masonic Villages of the Grand Lodge of Pennsylvania	PA	UNR	A
32	Otterbein Senior Lifestyle Choices	OH	UNR	A
3	ACTS Retirement Services, Inc.	PA	A-	UNR
54	Presbyterian Homes	IL	A-	BBB+
2	The Evangelical Lutheran Good Samaritan Society	SD	A-	BBB+
129	The RiverWoods Group	NH	A-	UNR
17	Westminster Communities of Florida	FL	A-	UNR
43	Bethesda Health Group, Inc.	MO	BBB+	UNR
71	BHI Senior Living, Inc.	IN	BBB+	UNR
7	HumanGood fka Cornerstone (ABHOW & be.group)	CA	BBB+	BBB-
6	Covenant Retirement Communities	IL	BBB+	UNR
24	Diakon Lutheran Social Ministries	PA	BBB+	UNR
46	Episcopal Senior Communities	CA	BBB+	UNR
13	Lutheran Senior Services	MO	BBB+	UNR
63	Masonicare	CT	BBB+	UNR
14	Presbyterian Senior Living	PA	BBB+	UNR
27	Springpoint Senior Living Inc.	NJ	BBB+	UNR
21	Front Porch Communities and Services	CA	UNR	BBB+
15	Asbury Communities	MD	BBB	UNR

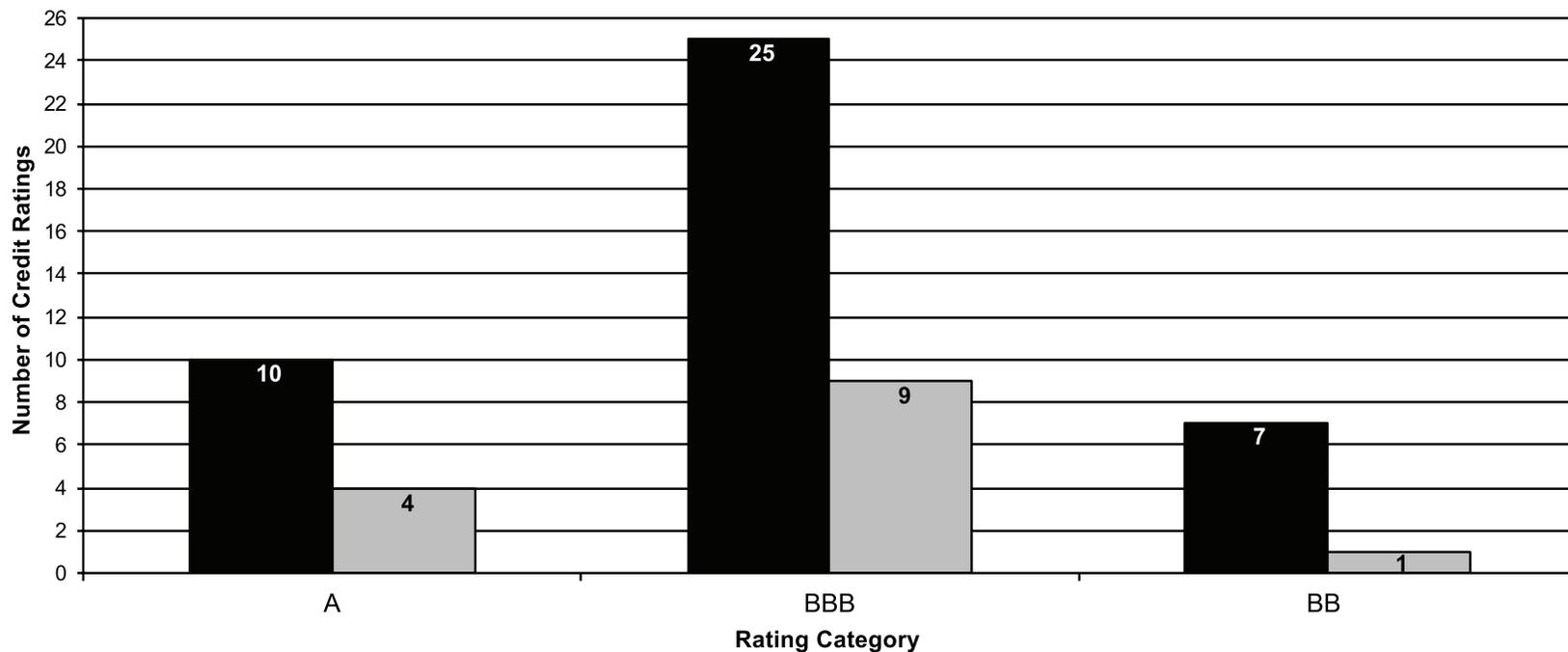
UNR: Unrated

2017 Rank	System Name	State	Rated	
			Fitch	S&P
102	Givens Estates	NC	BBB	UNR
107	Goodwin House Incorporated	VA	BBB	UNR
88	Presby's Inspired Life	PA	BBB	UNR
87	The United Methodist Retirement Homes, Inc.	NC	BBB	UNR
61	Eskaton	CA	UNR	BBB
125	Garden Spot Communities fka Garden Spot Village	PA	UNR	BBB
29	Shell Point Retirement Community	FL	UNR	BBB
127	Life Enriching Communities	OH	BBB-	BBB
105	Christian Care Centers, Inc.	TX	BBB-	UNR
28	Christian Homes, Inc.	MO	BBB-	UNR
34	Franciscan Communities, Inc.	IL	BBB-	UNR
113	Haverland Carter Lifestyle Group	NM	BBB-	UNR
56	Holland Home	MI	BBB-	UNR
126	Landis Communities	PA	BBB-	UNR
135	Messiah Lifeways	PA	BBB-	UNR
94	Morningside Ministries	TX	BBB-	UNR
80	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	BBB-	UNR
19	Ohio Living fka Ohio Presbyterian Retirement Services	OH	UNR	BBB-
149	The Loomis Communities	MA	UNR	BBB-
81	Blue Skies of Texas	TX	BB+	UNR
39	Greencroft Communities	IN	BB+	UNR
83	Methodist Retirement Communities	TX	BB+	UNR
70	Presbyterian Villages of Michigan	MI	BB+	UNR
48	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	BB+	UNR
132	Wesley Homes	WA	BB+	BB+
66	Friendship Senior Options, NFP	IL	BB-	UNR

4-8 2017 LeadingAge Ziegler 150

Organizational Characteristics: Debt Ratings

4-8b RATINGS BY CATEGORY



48 ratings in "A" & "BBB" Category
 8 in "BB" Category
 56 total ratings of debt for 51 organizations

■ Fitch □ S&P

4-9 2017 LeadingAge Ziegler 150

Analysis of the Data: Revenues

4-9a ANNUAL REVENUE BY ORGANIZATION

2017 Rank	System Name	State	Annual Revenue Tier
1	National Senior Campuses	MD	Tier I
2	The Evangelical Lutheran Good Samaritan Society	SD	Tier I
3	ACTS Retirement Services, Inc.	PA	Tier I
4	Presbyterian Homes & Services	MN	Tier I
6	Covenant Retirement Communities	IL	Tier I
7	HumanGood fka Cornerstone (ABHOW & be.group)	CA	Tier I
8	Ascension Senior Living	MO	Tier I
9	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	Tier I
11	Lifespace Communities, Inc.	IA	Tier I
12	The Kendal Corporation	PA	Tier I
13	Lutheran Senior Services	MO	Tier I
14	Presbyterian Senior Living	PA	Tier I
15	Asbury Communities	MD	Tier I
16	Presence Life Connections	IL	Tier I
18	The Carmelite System, Inc.	NY	Tier I
19	Ohio Living fka Ohio Presbyterian Retirement Services	OH	Tier I
20	Pacific Retirement Services, Inc.	OR	Tier I
22	Volunteers of America	VA	Tier I
24	Diakon Lutheran Social Ministries	PA	Tier I
37	National Church Residences	OH	Tier I
38	ArchCare	NY	Tier I
45	Hebrew SeniorLife, Inc.	MA	Tier I
52	Covenant Health, Inc.	MA	Tier I

2017 Rank	System Name	State	Annual Revenue Tier
85	United Church Homes and Services	NC	Tier I
104	The New Jewish Home fka Jewish Home Lifecare	NY	Tier I
17	Westminster Communities of Florida	FL	Tier II
21	Front Porch Communities and Services	CA	Tier II
23	Masonic Villages of the Grand Lodge of Pennsylvania	PA	Tier II
25	Ecumen	MN	Tier II
26	Presbyterian Manors of Mid-America, Inc.	KS	Tier II
27	Springpoint Senior Living Inc.	NJ	Tier II
28	Christian Homes, Inc.	MO	Tier II
29	Shell Point Retirement Community	FL	Tier II
32	Otterbein Senior Lifestyle Choices	OH	Tier II
34	Franciscan Communities, Inc.	IL	Tier II
35	Concordia Lutheran Ministries	PA	Tier II
36	Senior Quality Lifestyle Corporation	TX	Tier II
40	Providence Life Services	IL	Tier II
41	Elim Care, Inc.	MN	Tier II
44	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	Tier II
46	Episcopal Senior Communities	CA	Tier II
47	Lutheran Life Communities	IL	Tier II
48	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	Tier II
50	Loretto	NY	Tier II
54	Presbyterian Homes	IL	Tier II
56	Holland Home	MI	Tier II
60	Phoebe Ministries	PA	Tier II
61	Eskaton	CA	Tier II
63	Masonicare	CT	Tier II

Revenue is only for those that provided it

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 2017 LeadingAge Ziegler 150

Analysis of the Data: Revenues

4-9a ANNUAL REVENUE BY ORGANIZATION

2017 Rank	System Name	State	Annual Revenue Tier
64	Lutheran Services Carolinas, Inc.	NC	Tier II
68	SpiriTrust Lutheran	PA	Tier II
74	Lutheran SeniorLife	PA	Tier II
75	Lutheran Homes of South Carolina, Inc.	SC	Tier II
119	Samaritas fka Lutheran Social Services of Michigan	MI	Tier II
31	Christian Care Companies	AZ	Tier III
33	Willow Valley Communities	PA	Tier III
39	Greencroft Communities	IN	Tier III
43	Bethesda Health Group, Inc.	MO	Tier III
49	Bethesda Senior Living Communities	CO	Tier III
53	WesleyLife	IA	Tier III
55	Mississippi Methodist Senior Services, Inc.	MS	Tier III
57	United Church Homes, Inc.	OH	Tier III
59	Buckner Retirement Services, Inc.	TX	Tier III
62	SantaFe Senior Living, Inc.	FL	Tier III
65	Friendship Senior Options	IL	Tier III
66	Wesley Enhanced Living	PA	Tier III
67	Virginia United Methodist Homes, Inc.	VA	Tier III
69	American Baptist Homes of the Midwest	MN	Tier III
71	BHI Senior Living, Inc.	IN	Tier III
72	LifeSpire of Virginia fka Virginia Baptist Homes, Inc.	VA	Tier III
73	Integrace	MD	Tier III
76	Eventide	MN	Tier III
77	Northern California Presbyterian Homes & Services	CA	Tier III
78	United Methodist Homes	NY	Tier III
79	Walker Methodist	MN	Tier III

2017 Rank	System Name	State	Annual Revenue Tier
80	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	Tier III
83	Methodist Retirement Communities	TX	Tier III
84	The Presbyterian Homes, Inc.	NC	Tier III
86	Saint Therese	MN	Tier III
87	The United Methodist Retirement Homes, Inc.	NC	Tier III
88	Presby's Inspired Life	PA	Tier III
92	Liberty Lutheran Services	PA	Tier III
93	Presbyterian Communities of South Carolina	SC	Tier III
94	Morningside Ministries	TX	Tier III
96	Ingleside fka Westminster Ingleside Retirement Communities	DC	Tier III
97	St. Ann's Community	NY	Tier III
99	Sun Health Senior Living, LLC	AZ	Tier III
101	Presbyterian Communities and Services	TX	Tier III
102	Givens Estates	NC	Tier III
107	Goodwin House Incorporated	VA	Tier III
109	National Lutheran Inc. fka National Lutheran Home for the Aged	MD	Tier III
110	Christian Living Communities	CO	Tier III
111	Luthercare	PA	Tier III
115	Heritage Ministries	NY	Tier III
117	Wellspring Lutheran Services	MI	Tier III
118	Lutheran Social Ministries of New Jersey, Inc.	NJ	Tier III
121	United Church of Christ Homes	PA	Tier III
127	Life Enriching Communities	OH	Tier III

Revenue is only for those that provided it

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 2017 LeadingAge Ziegler 150

Analysis of the Data: Revenues

4-9a ANNUAL REVENUE BY ORGANIZATION

2017 Rank	System Name	State	Annual Revenue Tier
131	Methodist ElderCare Services fka Methodist ElderCare	OH	Tier III
133	Genacross Lutheran Services fka Lutheran Homes Society	OH	Tier III
137	Christian Health Care Center	NJ	Tier III
142	Moorings Park	FL	Tier III
144	Masonic Homes of Kentucky	KY	Tier III
145	Albright Care Services	PA	Tier III
146	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	Tier III
148	LindenGrove Communities fka LindenGrove, Inc.	WI	Tier III
10	Retirement Housing Foundation	CA	Tier IV
58	Baptist Village Communities	OK	Tier IV
70	Presbyterian Villages of Michigan	MI	Tier IV
81	Blue Skies of Texas	TX	Tier IV
90	Oakwood Lutheran Senior Ministries	WI	Tier IV
91	Vista Prairie Communities	MN	Tier IV
98	Living Branches	PA	Tier IV
100	Western Home Communities	IA	Tier IV
105	Christian Care Centers, Inc.	TX	Tier IV
106	Cedar Community	WI	Tier IV
112	Simpson Senior Services	PA	Tier IV
113	Haverland Carter Lifestyle Group	NM	Tier IV
114	Mather LifeWays	IL	Tier IV
120	Grace Inspired Ministries fka Lutheran Community at Telford & Rockhill Mennonite affiliation	PA	Tier IV
122	Wesley Willows	IL	Tier IV

2017 Rank	System Name	State	Annual Revenue Tier
123	United Methodist Memorial Home	IN	Tier IV
124	Sunnyside Presbyterian Home	VA	Tier IV
125	Garden Spot Communities fka Garden Spot Village	PA	Tier IV
126	Landis Communities	PA	Tier IV
129	The RiverWoods Group	NH	Tier IV
132	Wesley Homes	WA	Tier IV
134	Sunset Retirement Communities and Services	MI	Tier IV
135	Messiah Lifeways	PA	Tier IV
136	Maple Knoll Communities, Inc.	OH	Tier IV
140	St. John's Lutheran Ministries	MT	Tier IV
141	LifeStream Complete Senior Living, Inc.	AZ	Tier IV
143	Elder Care Alliance	CA	Tier IV
147	Episcopal SeniorLife Communities	NY	Tier IV
149	The Loomis Communities	MA	Tier IV
150	Bethany St. Joseph Corporation	WI	Tier IV

Revenue is only for those that provided it

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 2017 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	25	18.4%
Tier II: \$100-\$199 million	29	21.3%
Tier III: \$50-\$99 million	52	38.2%
Tier IV: \$25-\$49 million	30	22.1%
Tier V: < \$25 million	0	0.0%

4-10 2017 LeadingAge Ziegler 150

Analysis of the Data: Corporate Structure

4-10a MOST COMMON CORPORATE POSITIONS CREATED IN 2016

Position Added	Number of LZ 150 adding the position
Chief Clinical/Health Officer	9
Marketing & Sales Officer	7
Business Development/Strategy Officer	6
Regional Leadership Positions	6
Chief Information/Technology Officer	5
Chief Talent/Human Resources Officer	5
Chief Compliance Officer	5
Philanthropy/Foundation Director	4

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

4-10 2017 LeadingAge Ziegler 150

Analysis of the Data: Corporate Structure

4-10b 2017 LZ 150 CORPORATE STAFFING CHANGES

2017 Rank	System Name	State	Current (YE 2016)	Previous
CEO				
7	HumanGood fka Cornerstone (ABHOW & be.group)	CA	John Cochrane	Dave Ferguson
9	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	Steve Kastner	Ken Robbins
12	The Kendal Corporation	PA	Sean Kelly	John Diffey
29	Shell Point Retirement Community	FL	Martin Schappell	Peter Dys
31	Christian Care Companies	AZ	Alan Hieb	John Norris
71	BHI Senior Living, Inc.	IN	John Dattilo	Richard Keenan
91	Vista Prairie Communities	MN	Jim Bettendorf	Morris Knopf
94	Morningside Ministries	TX	Patrick Crump	Alvin Loewenberg
97	St. Ann's Community	NY	Michael McRae	Elizabeth Mullin-DiProsa
106	Cedar Community	WI	Lynn Olson	Steven Jaberg
110	Christian Living Communities	CO	Terry Rogers	Russ DenBraber
140	St. John's Lutheran Ministries	MT	David Trost	Kent Burgess
141	LifeStream Complete Senior Living, Inc.	AZ	Ronald Estes	David Ellis
143	Elder Care Alliance	CA	Adriene Iverson	Jesse Jantzen
CFO				
8	Ascension Senior Living	MO	Nick Harshfield	Joseph Girardi
12	The Kendal Corporation	PA	Amy Harrison	Tim Myers
15	Asbury Communities	MD	Rhonda Terranto (Interim)	Michael Connell
21	Front Porch Communities and Services	CA	Ryan Stearns	Mary Miller
25	Ecumen	MN	Scott McGuire	Dennis Johnson
28	Christian Homes, Inc.	MO	Chuck Schmitz	Susan McGhee
31	Christian Care Companies	AZ	Kathi Condon	David Klemm
40	Providence Life Services	IL	Barry VanderGenugten	William DeYoung
48	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	Jerry Schoeggl	Jack McKittrick
73	Integrace	MD	Jon Hansen	Jayson Luckenbaugh
88	Presby's Inspired Life	PA	Jennifer Kappen	Cindy Hoffman
104	The New Jewish Home fka Jewish Home Lifecare	NY	Elliot Hagler	Thomas Gilmartin
105	Christian Care Centers, Inc.	TX	Doug Harrison	Bob Zarbaugh
112	Simpson Senior Services	PA	Mark Aguilar	Jim Koniszewski
120	Grace Inspired Ministries fka Lutheran Community at Telford & Rockhill Mennonite Community	PA	Vince Gulotti	John Dybyk
132	Wesley Homes	WA	Jim Yamamoto	Jerry Schoeggl
135	Messiah Lifeways	PA	Carolyn Jacobs	Carolyn Burke
146	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	Gary Ventola	Carla Brooks

4-10 2017 LeadingAge Ziegler 150

Analysis of the Data: Corporate Structure

4-10b 2016 LZ 150 CORPORATE STAFFING CHANGES

2017 Rank	System Name	State	Current (YE 2016)	Previous
COO				
13	Lutheran Senior Services	MO	Gary Anderson	Jake Bell
31	Christian Care Companies	AZ	N/A	Alan Hieb
43	Bethesda Health Group	MO	N/A	Amy Trau
46	Episcopal Senior Communities	CA	Ronald Schaefer	Marilyn Kennedy
47	Lutheran Life Communities	IL	Bill Casper	James Holbrook
111	LutherCare	PA	Matthew Oathout	Curtis Evans
137	Christian Health Care Center	NJ	Steve Dumke	Denise Ratcliffe
140	St. John's Lutheran Ministries	MT	N/A	David Trost
147	Episcopal SeniorLife Communities	NY	N/A	Patricia Rubien
CIO/CTO				
6	Covenant Retirement Communities	MO	Bill Rabe	Sneha Patel
15	Asbury Communities	MD	David Baker	Francis Burns
57	United Church Homes, Inc.	OH	Willie Neumann (Interim)	Robert Weisbrodt
133	Lutheran Social Ministries of New Jersey	NJ	Beth Sparling	N/A

Analysis of the Data: Corporate Structure

4-10c 2017 LZ 150 CORPORATE TENURE

Position	Average Tenure (years)	n*
CEO	12.20	122
CFO	9.67	119
COO	6.27	79
CIO	7.98	48

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

4-11 2017 LeadingAge Ziegler 150

Organizational Characteristics: Accreditation

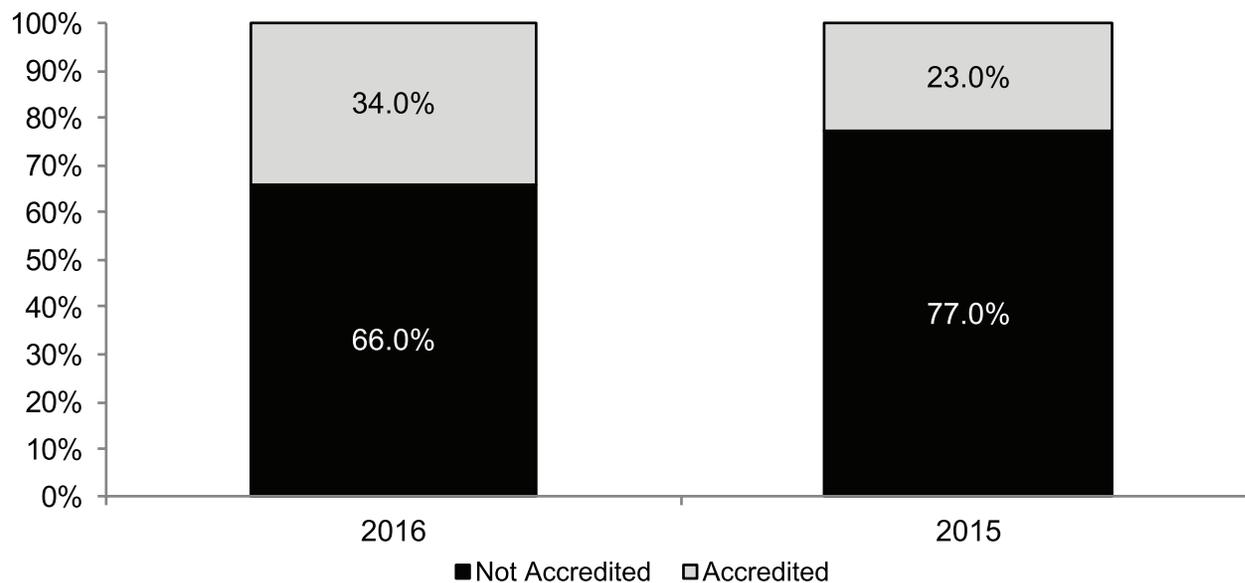
4-11a LZ 150 WITH ACCREDITED COMMUNITIES

2017 Rank	System Name	State	Accreditation			2017 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE				CARF	JCAHO	EAGLE
3	ACTS Retirement Services, Inc.	PA	21			107	Goodwin House Incorporated	VA	2		
44	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	21			142	Moorings Park	FL	2		
35	Concordia Lutheran Ministries	PA	12			1	National Senior Campuses	MD	1	1	
7	HumanGood fka Cornerstone (ABHOW & be.group)	CA	11			31	Christian Care Companies	AZ	1		
12	The Kendal Corporation	PA	9	2		63	Masonicare	CT	1		
15	Asbury Communities	MD	7		8	102	Givens Estates	NC	1		
20	Pacific Retirement Services, Inc.	OR	7			122	Wesley Willows	IL	1		1
27	Springpoint Senior Living Inc.	NJ	6	1		126	Landis Communities	PA	1		
67	Virginia United Methodist Homes, Inc.	VA	5			129	The RiverWoods Group	NH	1		
46	Episcopal Senior Communities	CA	4			16	Presence Life Connections	IL		16	
149	The Loomis Communities	MA	4			34	Franciscan Communities, Inc.	IL		6	
52	Covenant Health, Inc.	MA	3	1		47	Lutheran Life Communities	IL		5	
54	Presbyterian Homes	IL	3			40	Providence Life Services	IL		6	
71	BHI Senior Living, Inc.	IN	3			43	Bethesda Health Group, Inc.	MO		3	
73	Integrace	MD	3			104	The New Jewish Home fka Jewish Home Lifecare	NY		2	
77	Northern California Presbyterian Homes & Services	CA	3			137	Christian Health Care Center	NJ		1	
84	The Presbyterian Homes, Inc.	NC	3			29	Shell Point Retirement Community	FL			1
96	Ingleside fka Westminster Ingleside Retirement Communities	DC	3			32	Otterbein Senior Lifestyle Choices	OH			5
37	National Church Residences	OH	2			55	Mississippi Methodist Senior Services, Inc.	MS			12
45	Hebrew SeniorLife, Inc.	MA	2			80	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ			9
66	Friendship Senior Options	IL	2			87	The United Methodist Retirement Homes, Inc.	NC			4
81	Blue Skies of Texas	TX	2	2		81	Blue Skies of Texas	TX	2	2	
							Totals		147	46	40

4-11 2017 LeadingAge Ziegler 150

Organizational Characteristics: Accreditation

4-11b LZ 150 WITH AT LEAST ONE ACCREDITED COMMUNITY



147 Accredited Communities through CARF

46 Accreditations through JCAHO

44 Accreditations through EAGLE

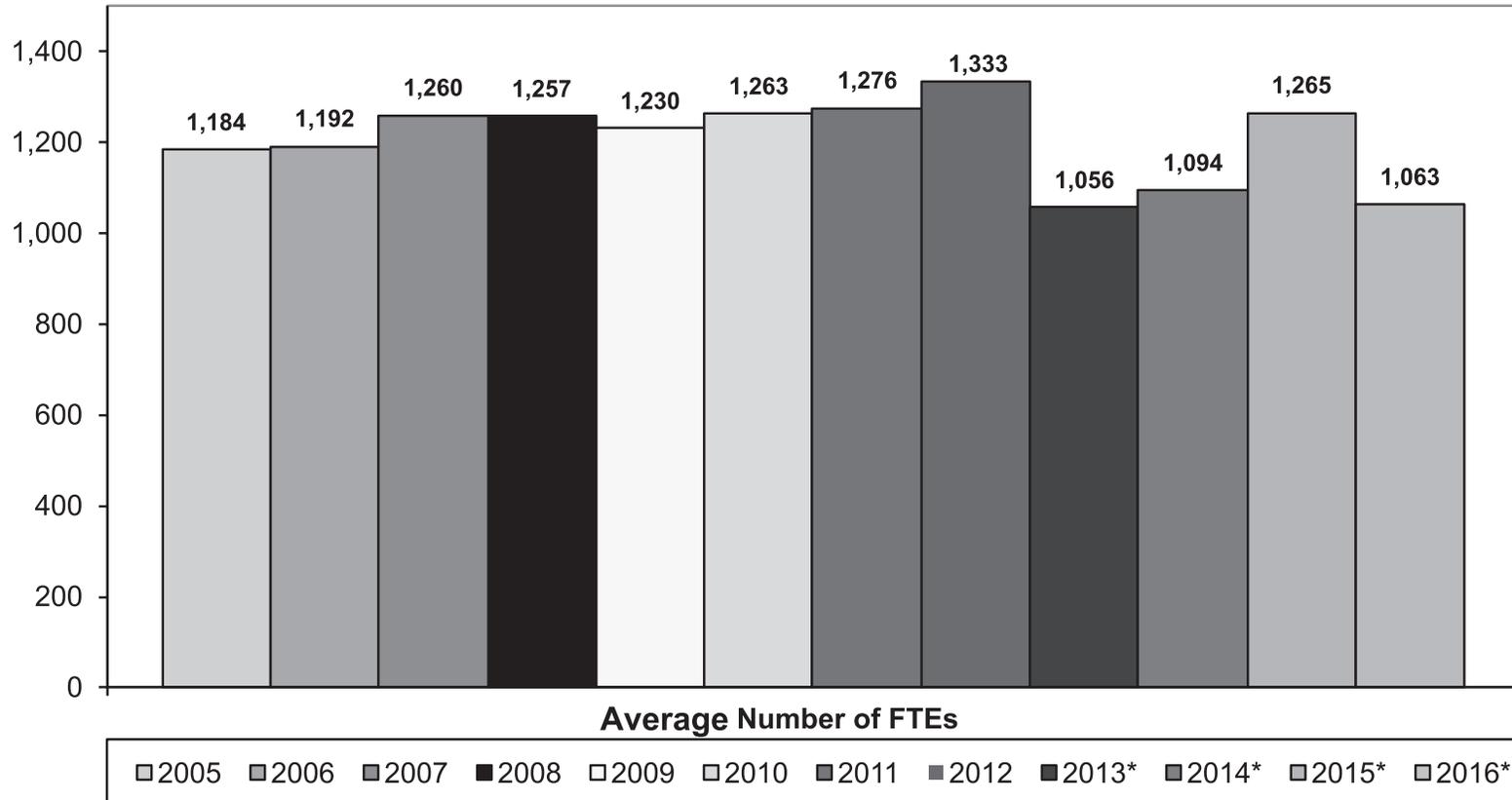
Note: Data is self-reported from providers and is not independently verified

4-12 2017 LeadingAge Ziegler 150

Organizational Characteristics: Staffing

4-12a AVERAGE NUMBER OF EMPLOYEES, 2005-2015

2016* Average FTE/Resident: .62



*2013, 2014, 2015, and 2016 reflect change to the largest 150 organizations

4-12 2017 LeadingAge Ziegler 150

Summary of the Data: Staffing

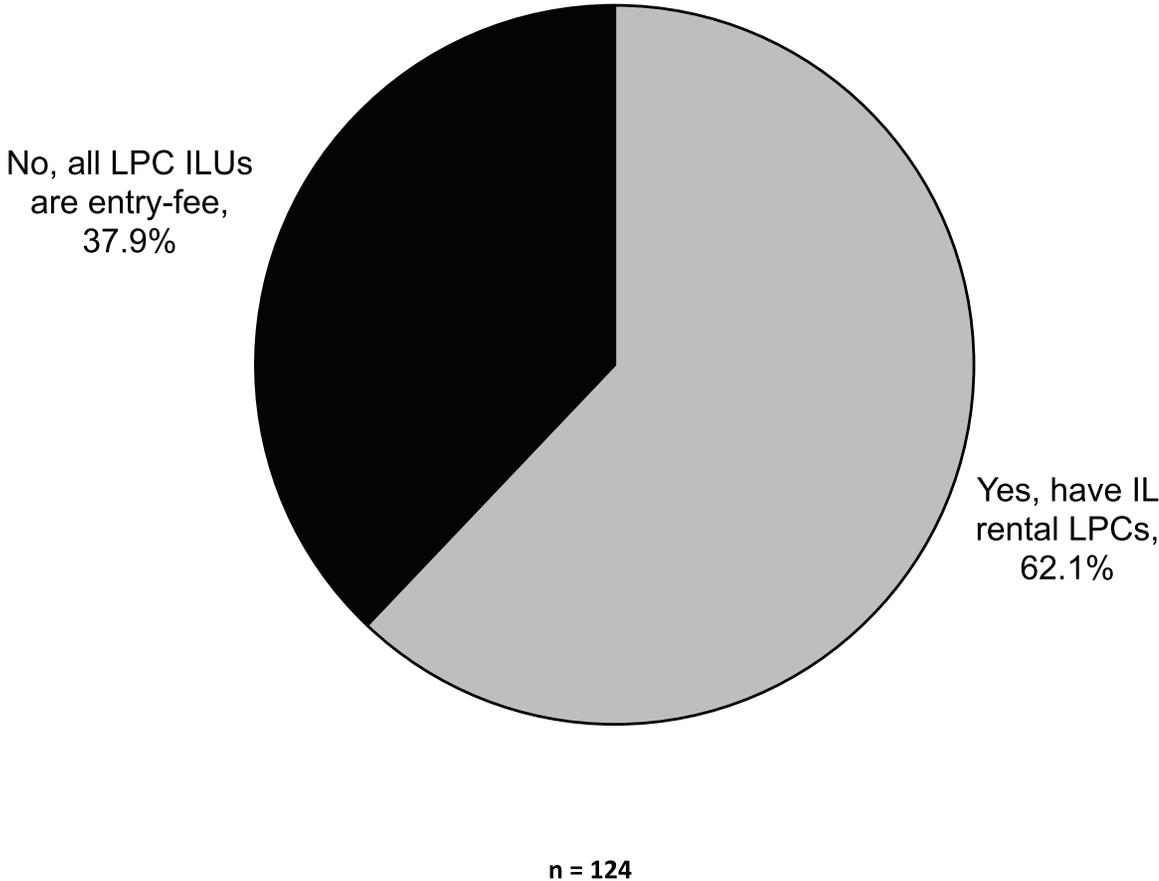
4-12b SUMMARY OF EMPLOYEES, 2010-2016

Analysis for 2017 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/unit n=85	1,331	0.67
2013* avg FTE/unit n=121	1,056	0.67
2014* avg FTE/unit n=123	1,093	0.67
2015* avg FTE/unit n=123	1,265	0.69
2016* avg FTE/unit n=129	1,063	0.62

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

4-13 2017 LeadingAge Ziegler 150

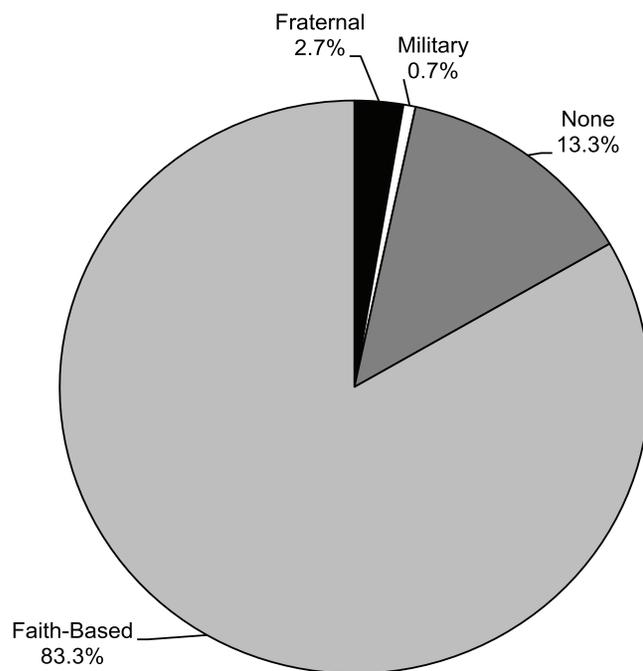
Organizational Characteristics: RENTAL LIFE PLAN COMMUNITIES 4-13a LZ 150 ORGANIZATIONS WITH LPC RENTAL IL OPTION



4-14 2017 LeadingAge Ziegler 150

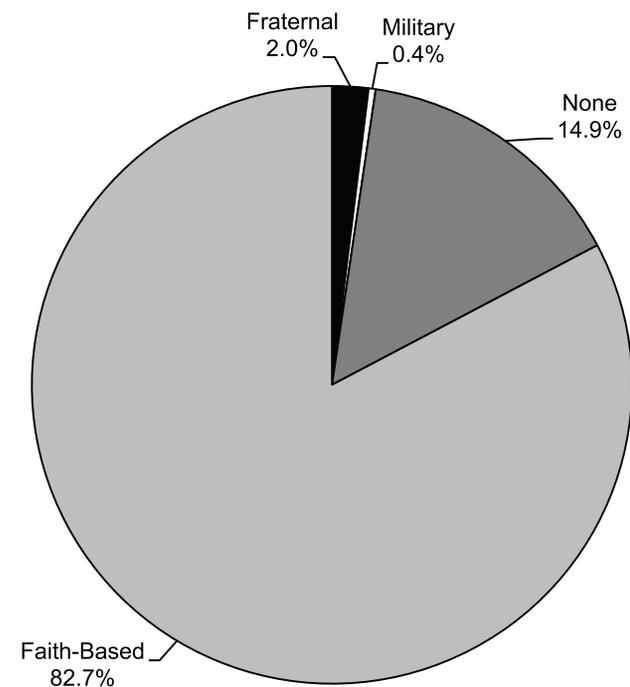
Analysis of the Data: Affiliations

4-14a AFFILIATION BY TOTAL NUMBER OF SYSTEMS



Analysis of the Data: Affiliations

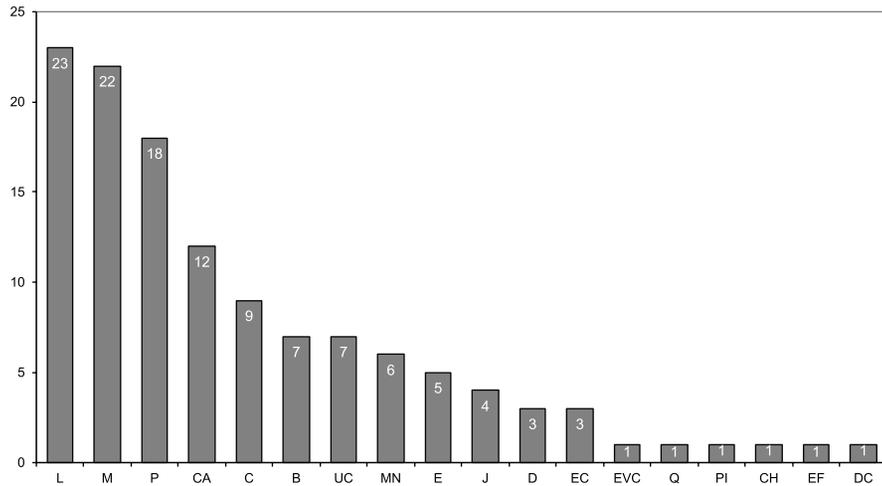
4-14b AFFILIATION BY TOTAL NUMBER OF UNITS



4-14 2017 LeadingAge Ziegler 150

Analysis of the Data: Affiliations

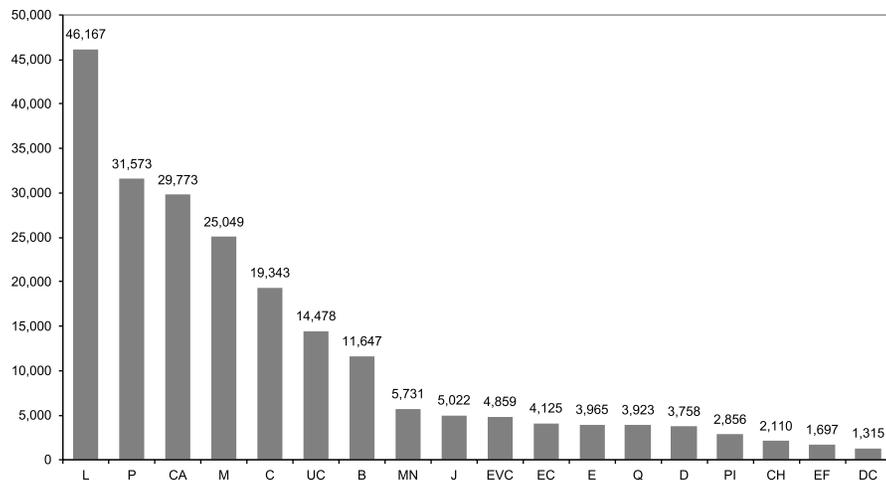
4-14c FAITH-BASED AFFILIATIONS, BY TOTAL NUMBER OF SYSTEMS



	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 2017 LeadingAge Ziegler 150

Organizational Characteristics: Affordable Housing

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

LZ 150 AH Rank	2017 Rank	System Name	State	Units	Communities
1	37	National Church Residences	OH	16,382	251
2	10	Retirement Housing Foundation	CA	11,739	131
3	22	Volunteers of America	VA	10,077	179
4	7	Cornerstone fka Cornerstone Affiliates (ABHOW & be.group affiliation)	CA	3,490	45
5	88	Presby's Inspired Life	PA	2,241	32
6	57	United Church Homes, Inc.	OH	2,074	49
7	17	Westminster Communities of Florida	FL	1,845	9
8	27	Springpoint Senior Living Inc.	NJ	1,785	18
9	70	Presbyterian Villages of Michigan	MI	1,560	27
10	2	The Evangelical Lutheran Good Samaritan Society	SD	1,494	46
11	14	Presbyterian Senior Living	PA	1,069	14
12	20	Pacific Retirement Services, Inc.	OR	1,045	25
13	44	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	1,041	23
14	61	Eskaton	CA	828	13
15	45	Hebrew SeniorLife, Inc.	MA	765	3
16	46	Episcopal Senior Communities	CA	676	6
17	133	Genacross Lutheran Services fka Lutheran Homes Society	OH	651	12
18	9	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	607	8
19	77	Northern California Presbyterian Homes & Services	CA	599	3
20	146	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	566	12
21	104	The New Jewish Home fka Jewish Home Lifecare	NY	550	5
22	25	Ecumen	MN	534	11
23	13	Lutheran Senior Services	MO	459	6
24	118	Lutheran Social Ministries of New Jersey, Inc.	NJ	428	5
25	60	Phoebe Ministries	PA	356	8
26	39	Greencroft Communities	IN	352	3
27	119	Samaritas fka Lutheran Social Services of Michigan	MI	340	5
28	24	Diakon Lutheran Social Ministries	PA	335	4
29	52	Covenant Health, Inc.	MA	322	3
30	83	Methodist Retirement Communities	TX	319	5
31	80	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	300	5

Note: Additional Affordable Housing listings in Chapter 6

4-15 2017 LeadingAge Ziegler 150

Organizational Characteristics: Affordable Housing

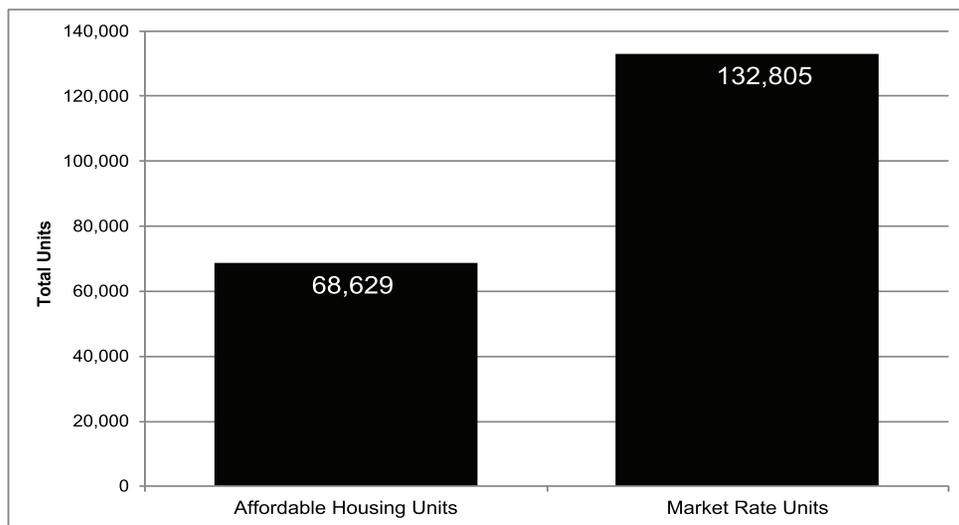
4-15a LZ 150 PROVIDERS OF HOUSING, RANKED BY TOTAL AFFORDABLE HOUSING UNITS

LZ 150 AH Rank	2017 Rank	System Name	State	Units	Communities
32	4	Presbyterian Homes & Services	MN	293	3
33	137	Christian Health Care Center	NJ	275	2
34	74	Lutheran SeniorLife	PA	269	7
35	85	United Church Homes and Services	NC	252	7
36	117	Wellspring Lutheran Services	MI	231	5
37	31	Christian Care Companies	AZ	222	3
38	102	Givens Estates	NC	220	2
39	15	Asbury Communities	MD	187	2
40	65	Wesley Enhanced Living	PA	162	3
41	40	Providence Life Services	IL	160	2
42	50	Loretto	NY	149	4
43	34	Franciscan Communities, Inc.	IL	139	3
44	8	Ascension Senior Living	MO	108	1
45	68	SpiriTrust Lutheran	PA	107	3
46	21	Front Porch Communities and Services	CA	100	1
47	98	Living Branches	PA	100	1
48	136	Maple Knoll Communities, Inc.	OH	94	2
49	69	American Baptist Homes of the Midwest	MN	90	1
50	30	Augustana Care	MN	84	0
51	112	Simpson Senior Services	PA	81	2
52	144	Masonic Homes of Kentucky	KY	70	1
53	16	Presence Life Connections	IL	51	0
54	41	Elim Care, Inc.	MN	48	1
55	76	Eventide	MN	45	1
56	110	Christian Living Communities	CO	40	1
57	147	Episcopal SeniorLife Communities	NY	40	1
58	19	Ohio Living fka Ohio Presbyterian Retirement Services	OH	39	1
59	126	Landis Communities	PA	36	1
60	64	Lutheran Services Carolinas, Inc.	NC	33	1
61	90	Oakwood Lutheran Senior Ministries	WI	30	0
62	87	The United Methodist Retirement Homes, Inc.	NC	24	1
63	55	Mississippi Methodist Senior Services, Inc.	MS	13	1
64	28	Christian Homes, Inc.	MO	8	1

4-15 2017 LeadingAge Ziegler 150

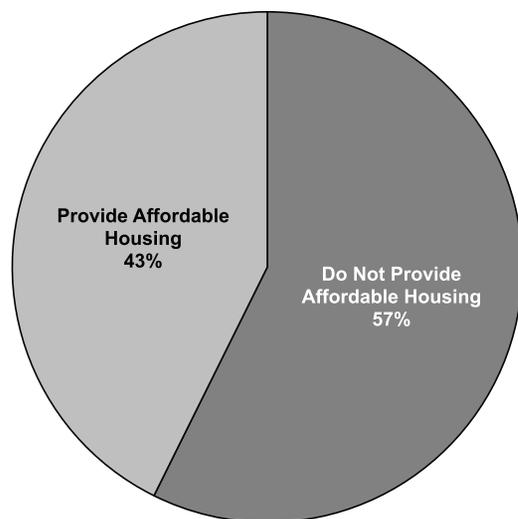
Organizational Characteristics: Affordable Housing

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



Organizational Characteristics: Affordable Housing

4-15c PERCENTAGE OF LZ 150 PROVIDING HOUSING



4-16 2017 LeadingAge Ziegler 150

Organizational Characteristics: Managed Units & Communities

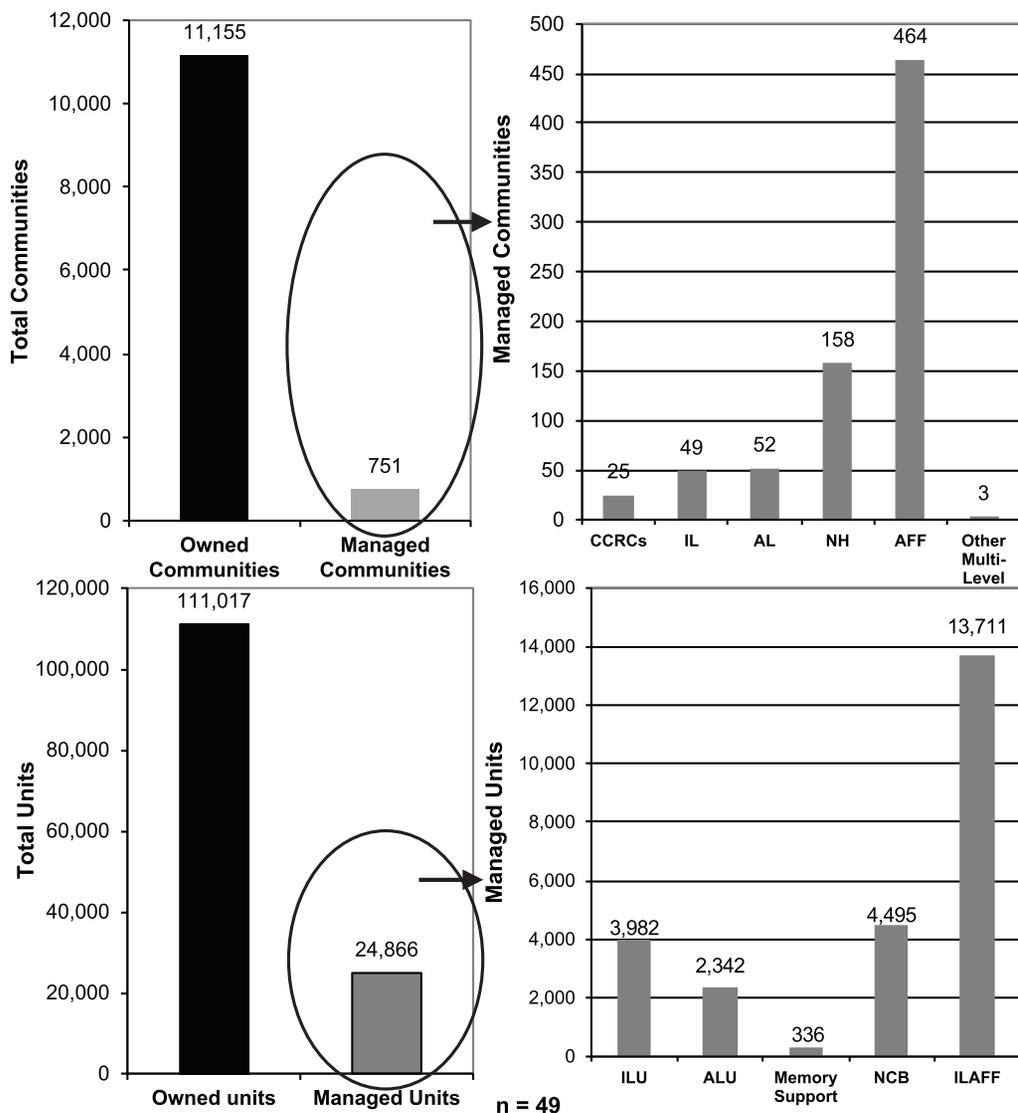
4-16a LZ 150 PROVIDERS THAT MANAGE, RANKED BY MANAGED-ONLY UNITS

LZ 150 Managed Rank	2017 LZ 150 Rank	System Name	State	Managed-only		LZ 150 Managed Rank	2017 LZ 150 Rank	System Name	State	Managed-only	
				Units	Communities					Units	Communities
1	37	National Church Residences	OH	3,734	59	24	13	Lutheran Senior Services	MO	274	0
2	9	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	1,772	11	25	119	Samaritas fka Lutheran Social Services of Michigan	MI	248	0
3	7	HumanGood fka Cornerstone (ABHOW & be.group)	CA	1,645	5	26	110	Christian Living Communities	CO	246	2
4	21	Front Porch Communities and Services	CA	1,642	23	27	16	Presence Life Connections	IL	215	5
5	57	United Church Homes, Inc.	OH	1,454	3	28	63	Masonicare	CT	215	3
6	2	The Evangelical Lutheran Good Samaritan Society	SD	1,049	13	29	71	BHI Senior Living, Inc.	IN	199	0
7	25	Ecumen	MN	1,035	16	30	43	Bethesda Health Group, Inc.	MO	182	2
8	88	Presby's Inspired Life	PA	995	0	31	34	Franciscan Communities, Inc.	IL	178	2
9	146	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	993	3	32	107	Goodwin House Incorporated	VA	161	0
10	44	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	879	5	33	140	St. John's Lutheran Ministries	MT	160	2
11	20	Pacific Retirement Services, Inc.	OR	767	3	34	39	Greencroft Communities	IN	154	2
12	70	Presbyterian Villages of Michigan	MI	705	4	35	150	Bethany St. Joseph Corporation	WI	135	3
13	109	National Lutheran Inc. fka National Lutheran Home for the Aged	MD	670	0	36	47	Lutheran Life Communities	IL	106	1
14	84	The Presbyterian Homes, Inc.	NC	564	2	37	46	Episcopal Senior Communities	CA	99	0
15	52	Covenant Health, Inc.	MA	521	4	38	136	Maple Knoll Communities, Inc.	OH	94	0
16	61	Eskaton	CA	505	2	39	100	Western Home Communities	IA	88	4
17	8	Ascension Senior Living	MO	478	2	40	28	Christian Homes, Inc.	MO	60	0
18	18	The Carmelite System, Inc.	NY	429	2	41	77	Northern California Presbyterian Homes & Services	CA	54	0
19	117	Wellspring Lutheran Services	MI	427	13	42	10	Retirement Housing Foundation	CA	50	0
20	23	Masonic Villages of the Grand Lodge of Pennsylvania	PA	424	1	43	74	Lutheran SeniorLife	PA	45	0
21	40	Providence Life Services	IL	346	1	44	27	Springpoint Senior Living Inc.	NJ	40	0
22	17	Westminster Communities of Florida	FL	343	0	45	64	Lutheran Services Carolinas, Inc.	NC	33	0
23	80	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	300	0	46	85	United Church Homes and Services	NC	32	0
						47	118	Lutheran Social Ministries of New Jersey, Inc.	NJ	20	0
						48	4	Presbyterian Homes & Services	MN	137	1
						49	30	Augustana Care	MN	8	1

4-16 2017 LeadingAge Ziegler 150

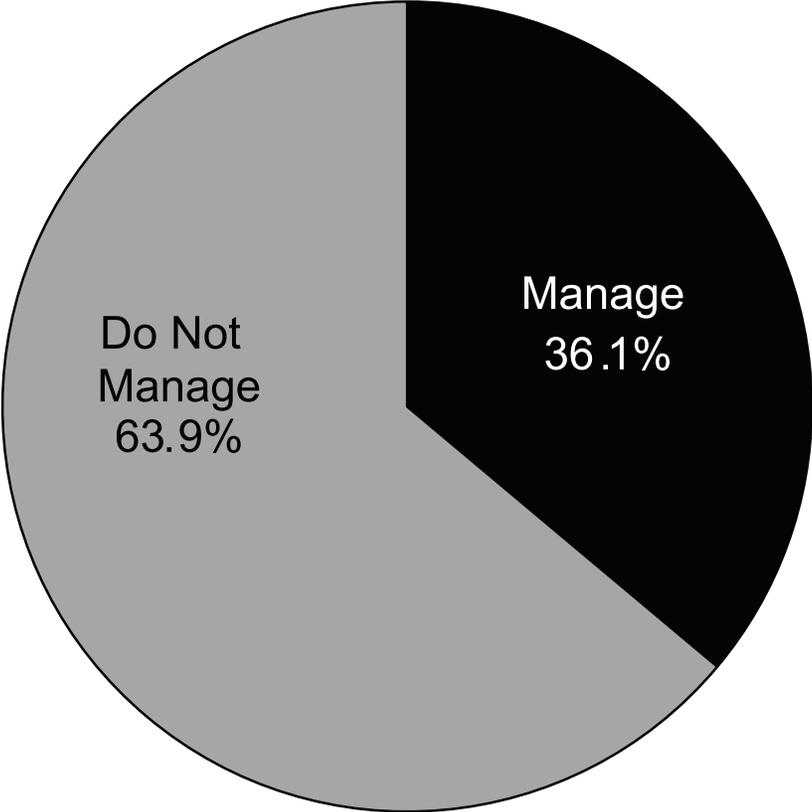
Organizational Characteristics: Managed Units & Communities

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



4-16 2017 LeadingAge Ziegler 150

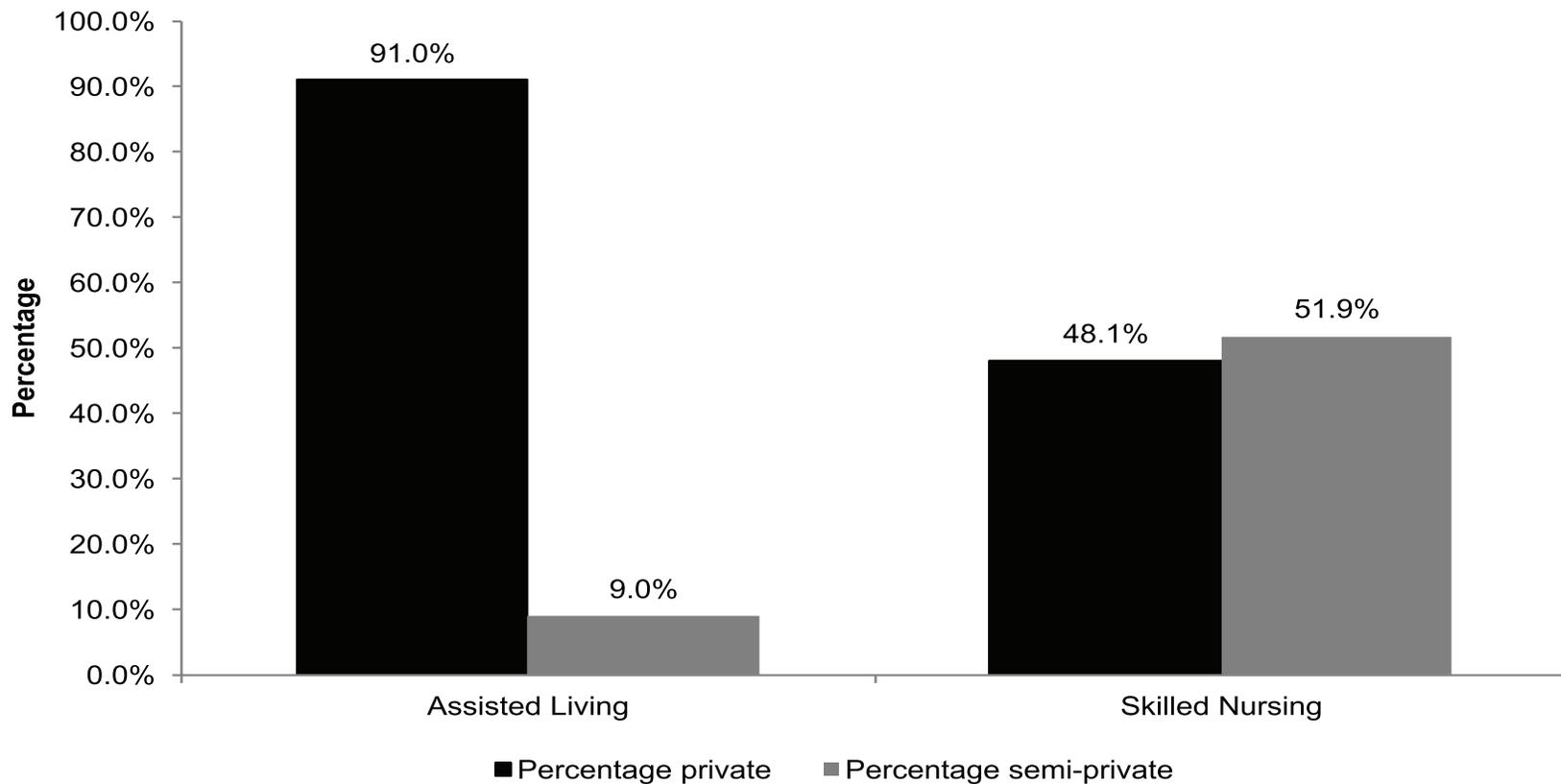
Organizational Characteristics: Managed Units & Communities
4-16c PERCENTAGE OF LZ 150 THAT MANAGE



n = 136

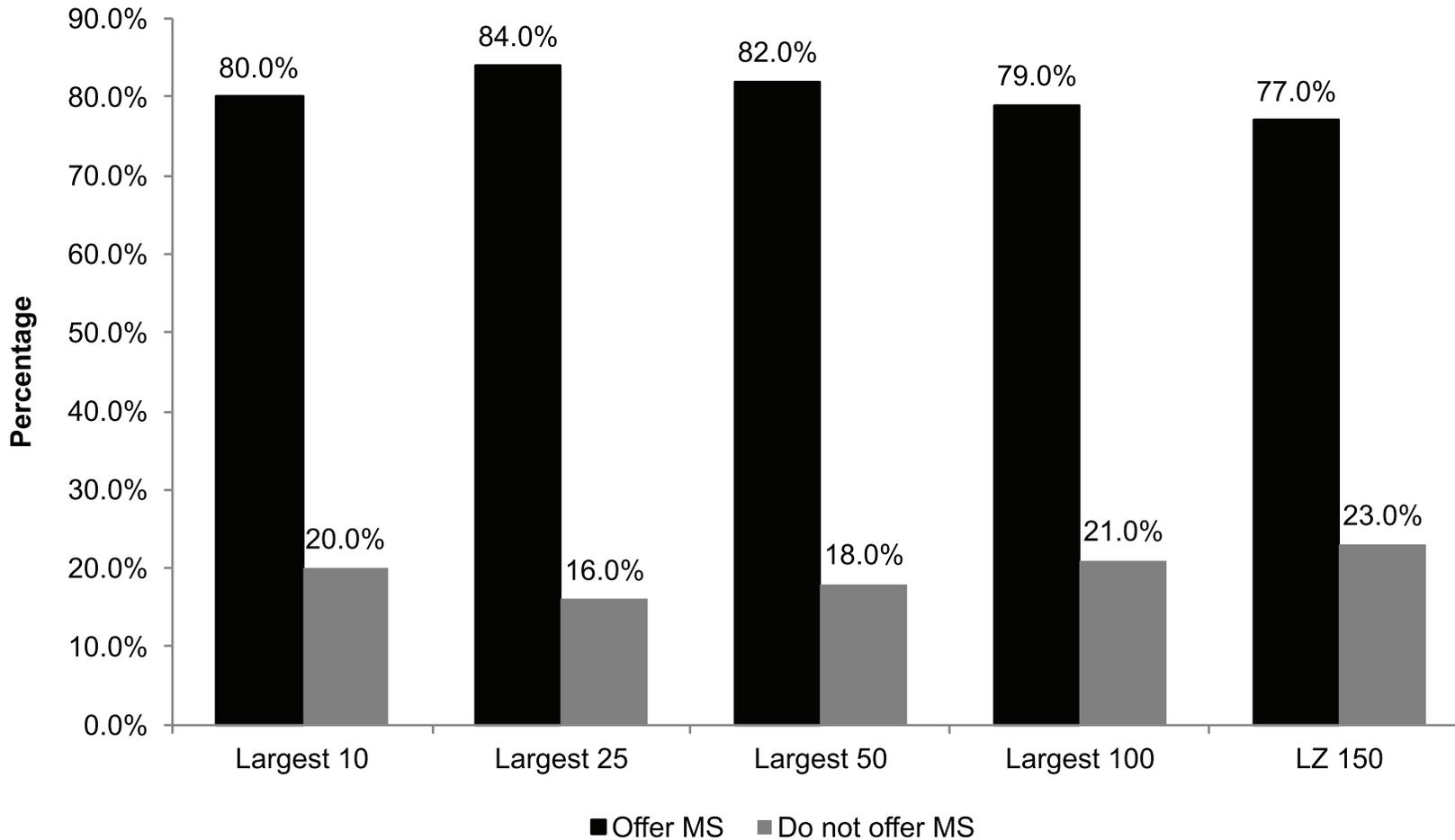
4-17 2017 LeadingAge Ziegler 150

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



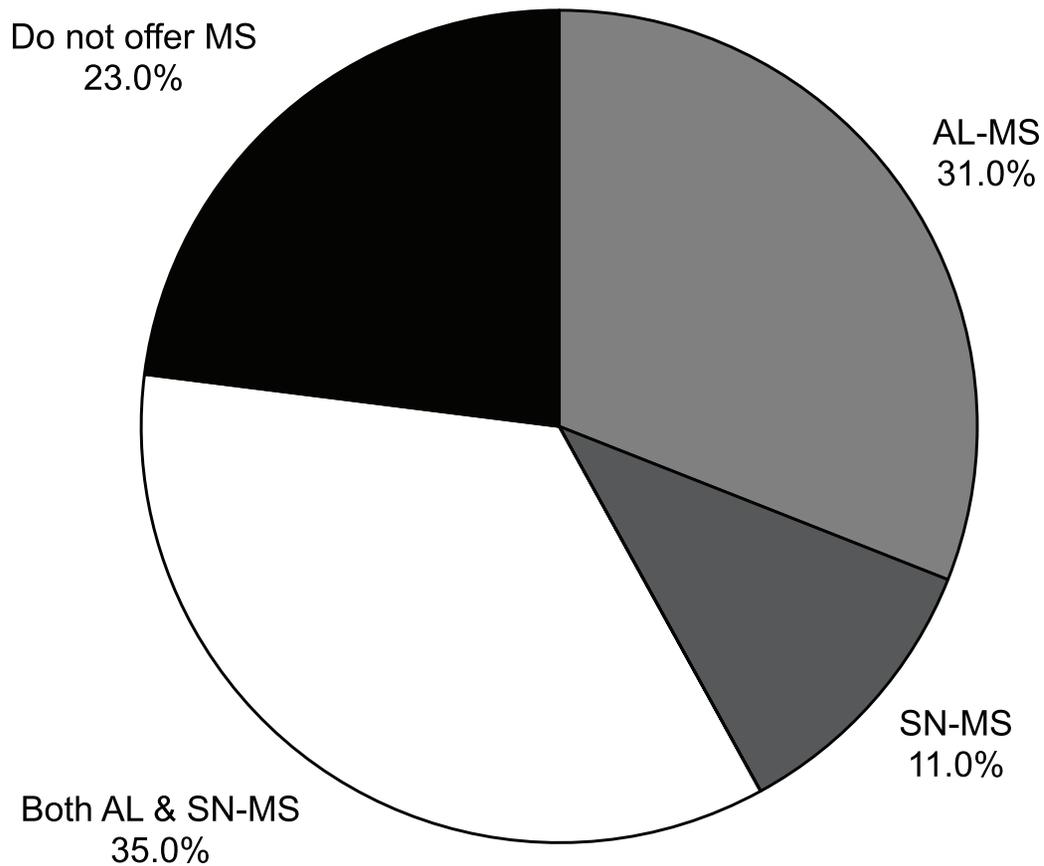
4-17 2017 LeadingAge Ziegler 150

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



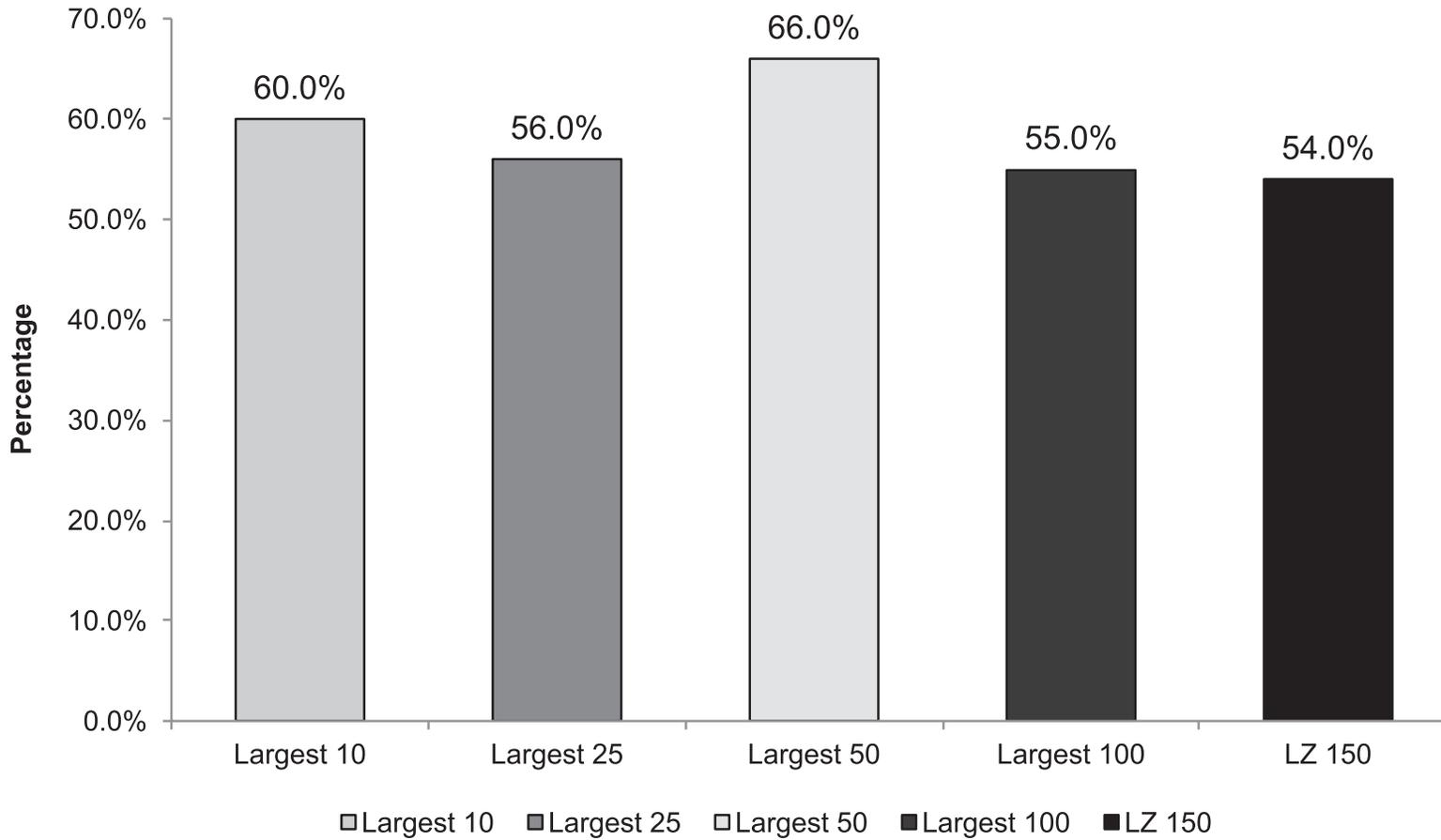
4-17 2017 LeadingAge Ziegler 150

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



4-18 2017 LeadingAge Ziegler 150

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

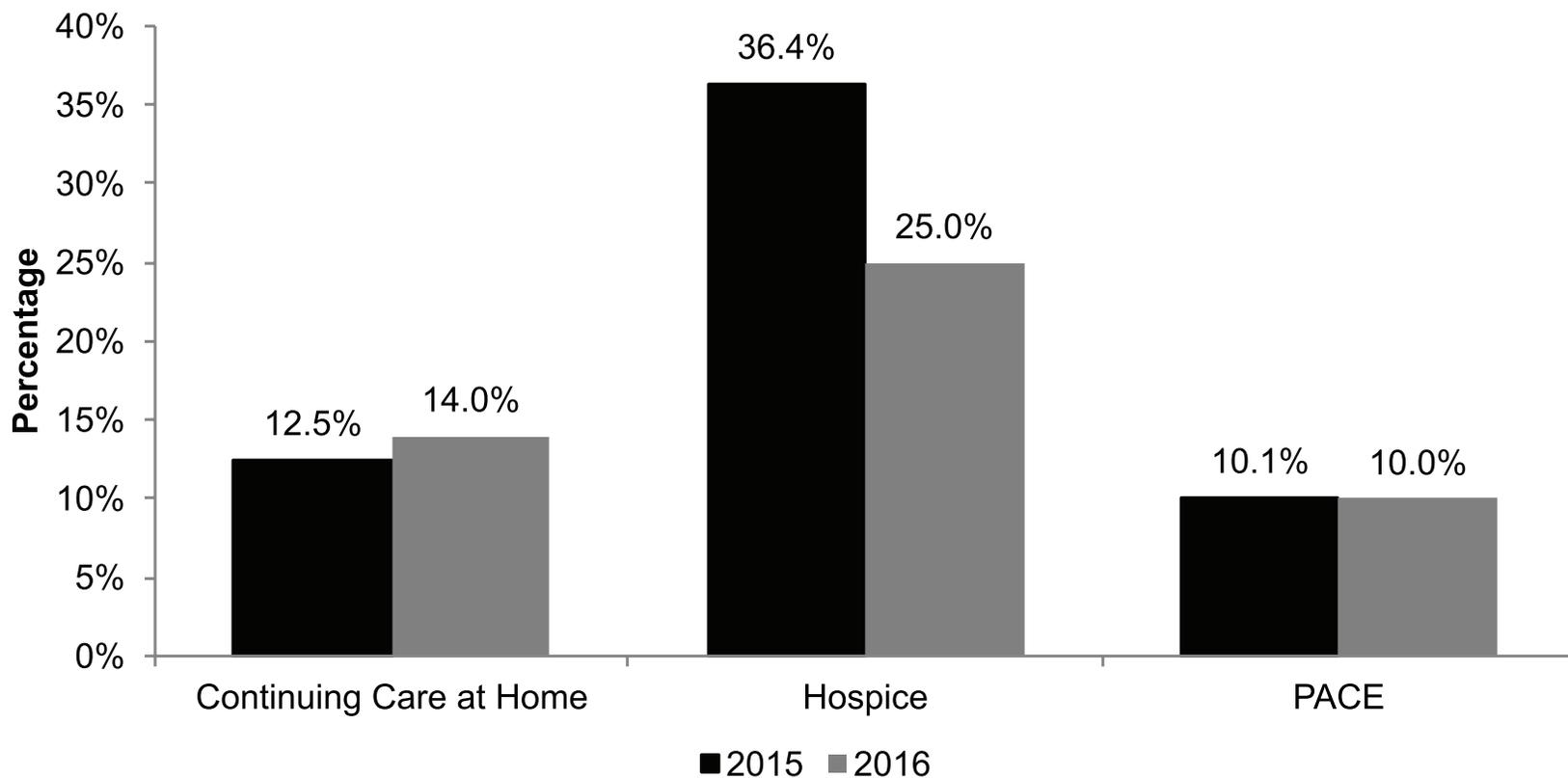


LeadingAge
150
Ziegler

4-18 2017 LeadingAge Ziegler 150

Organizational Characteristics: Home & Community-Based Services

4-18b LZ 150 OFFERING: CCaH, EXTERNAL HOSPICE, PACE



4-18 2017 LeadingAge Ziegler 150

Organizational Characteristics: Home & Community-Based Services 4-18c LZ 150 HCBS: PROVIDERS WITH \$10 MILLION+ in HCBS REVENUE

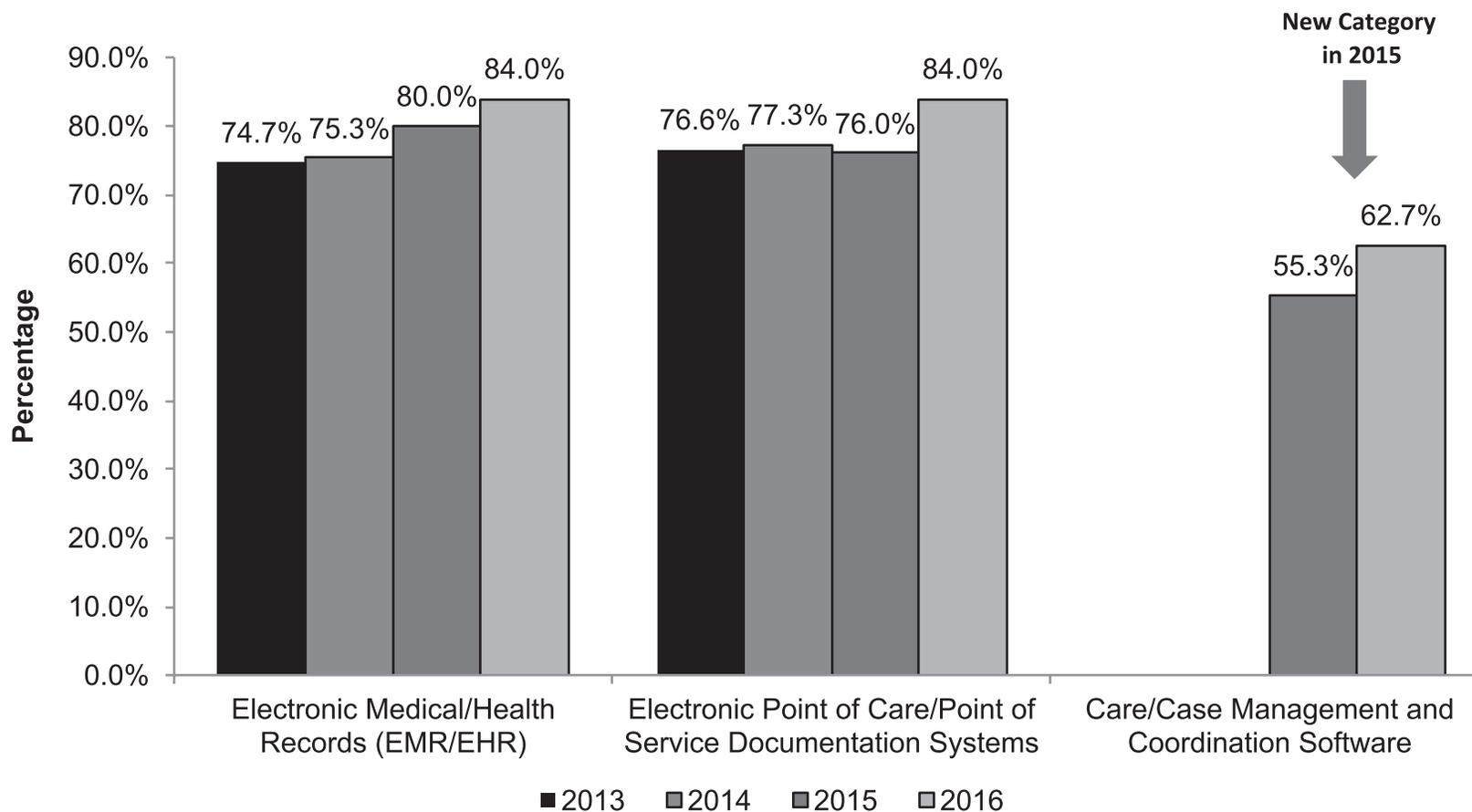
2017 HCBS Revenue Rank	System Name	State	HCBS Annual Revenue
38	ArchCare	NY	>\$50 million
2	The Evangelical Lutheran Good Samaritan Society	SD	>\$50 million
63	Masonicare	CT	>\$50 million
35	Concordia Lutheran Ministries	PA	>\$50 million
56	Holland Home	MI	>\$50 million
8	Ascension Senior Living	MO	>\$50 million
16	Presence Life Connections	IL	\$25-\$50 million
50	Loretto	NY	\$25-\$50 million
19	Ohio Living fka Ohio Presbyterian Retirement Services	OH	\$25-\$50 million
104	The New Jewish Home fka Jewish Home Lifecare	NY	\$25-\$50 million
70	Presbyterian Villages of Michigan	MI	\$25-\$50 million
68	SpiriTrust Lutheran	PA	\$25-\$50 million
37	National Church Residences	OH	\$10-\$24 million
4	Presbyterian Homes & Services	MN	\$10-\$24 million
6	Covenant Retirement Communities	IL	\$10-\$24 million
74	Lutheran SeniorLife	PA	\$10-\$24 million
85	United Church Homes and Services	NC	\$10-\$24 million
25	Ecumen	MN	\$10-\$24 million
75	Lutheran Homes of South Carolina, Inc.	SC	\$10-\$24 million
53	WesleyLife	IA	\$10-\$24 million
45	Hebrew SeniorLife, Inc.	MA	\$10-\$24 million
101	Presbyterian Communities and Services	TX	\$10-\$24 million

Reflects revenues for those who provided it

4-19 2017 LeadingAge Ziegler 150

Organizational Characteristics: Technology

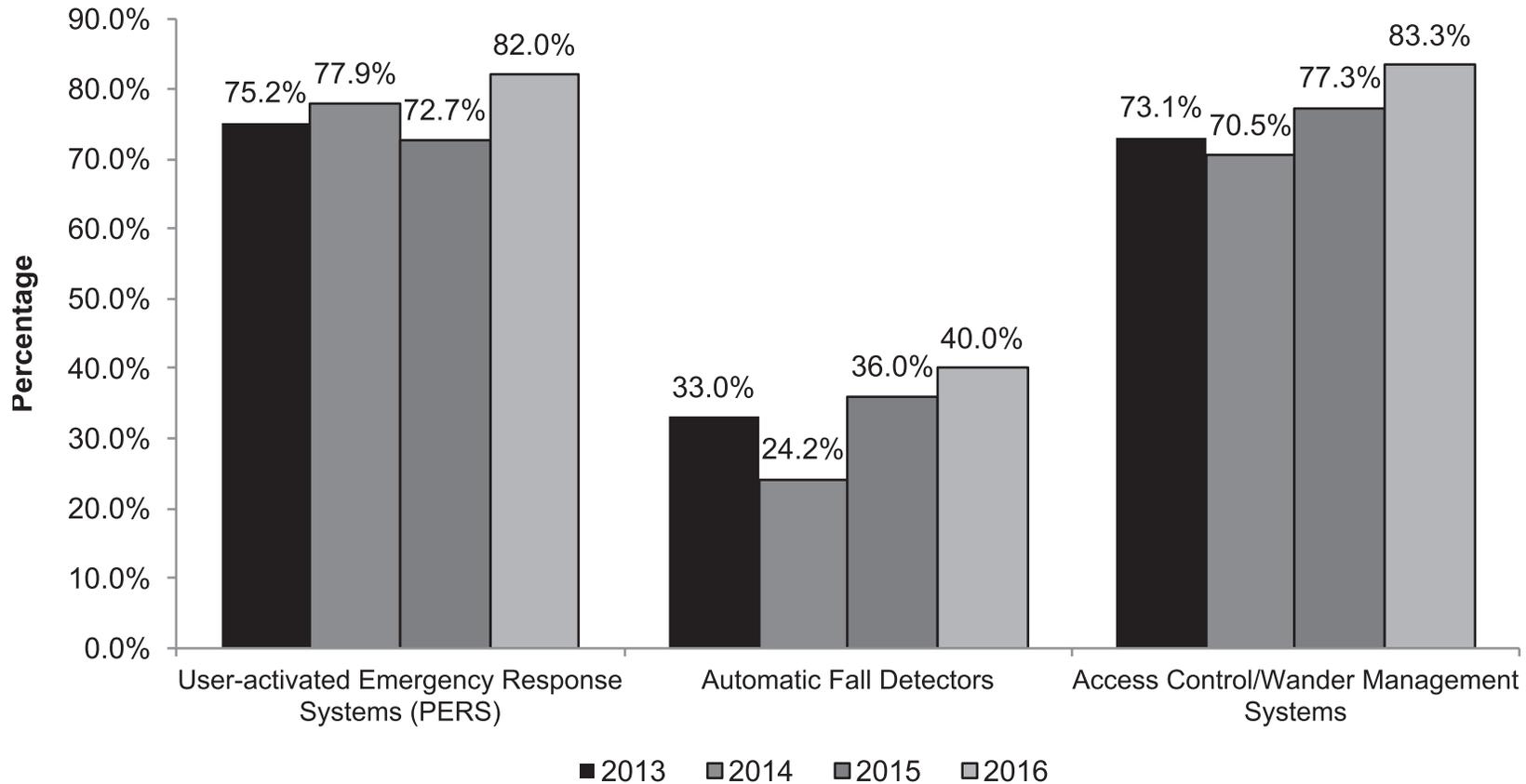
4-19a PERCENTAGE OF LZ 150 COMMUNITIES/OPERATIONS USING ELECTRONIC DOCUMENTATION TECHNOLOGIES



4-19 2017 LeadingAge Ziegler 150

Organizational Characteristics: Technology

4-19b PERCENTAGE OF LZ 150 COMMUNITIES/OPERATIONS USING SAFETY MONITORING TECHNOLOGIES

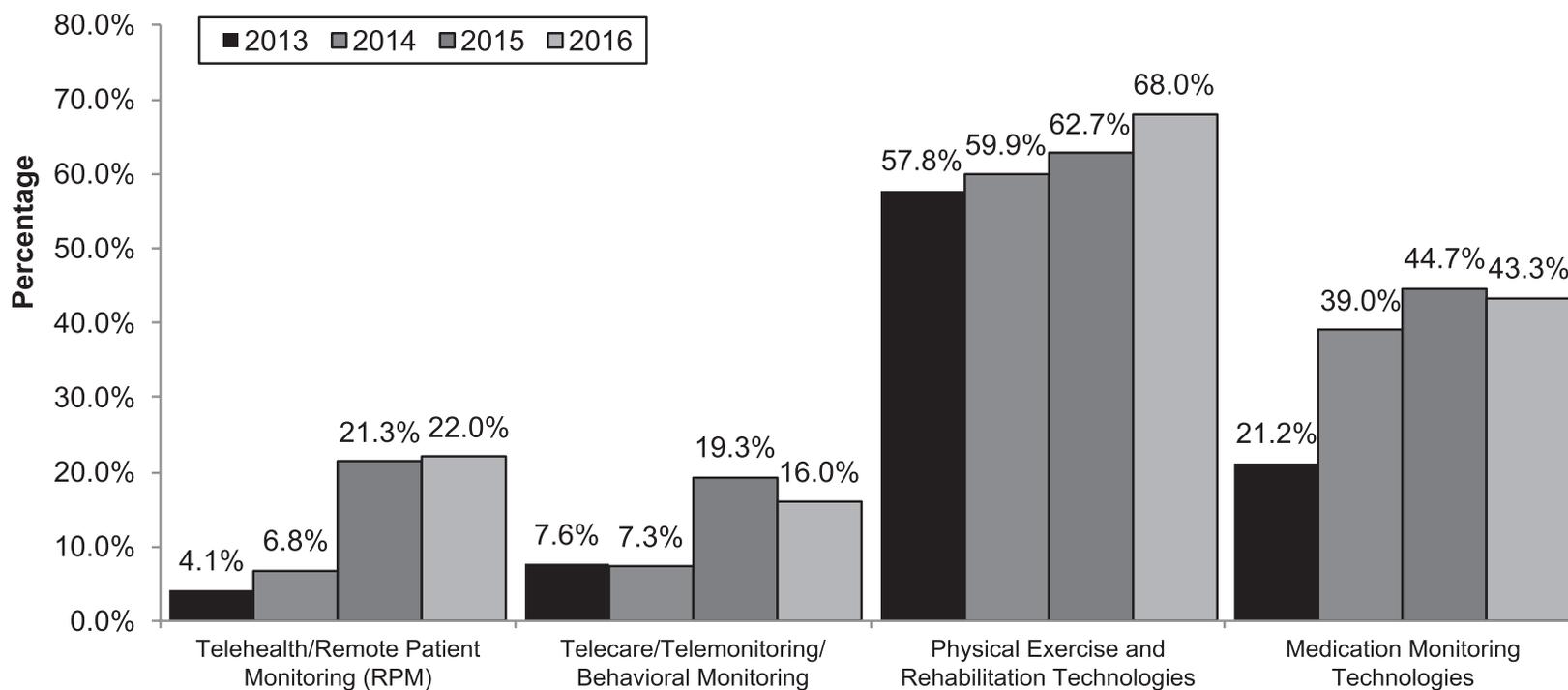


LeadingAge 150 Ziegler

4-19 2017 LeadingAge Ziegler 150

Organizational Characteristics: Technology

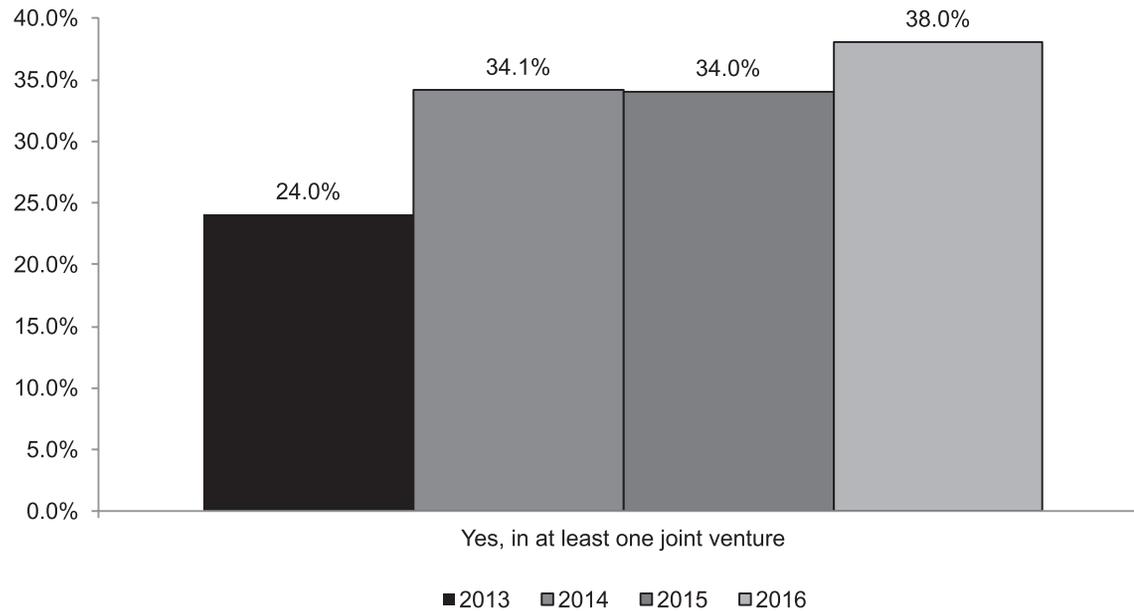
4-19c PERCENTAGE OF LZ 150 COMMUNITIES/OPERATIONS USING HEALTH & WELLNESS MONITORING TECHNOLOGIES



4-20 2017 LeadingAge Ziegler 150

Organizational Characteristics: Joint Ventures

4-20a PERCENTAGE OF LZ 150 ENGAGED IN A JOINT VENTURE



Organizational Characteristics: Joint Ventures

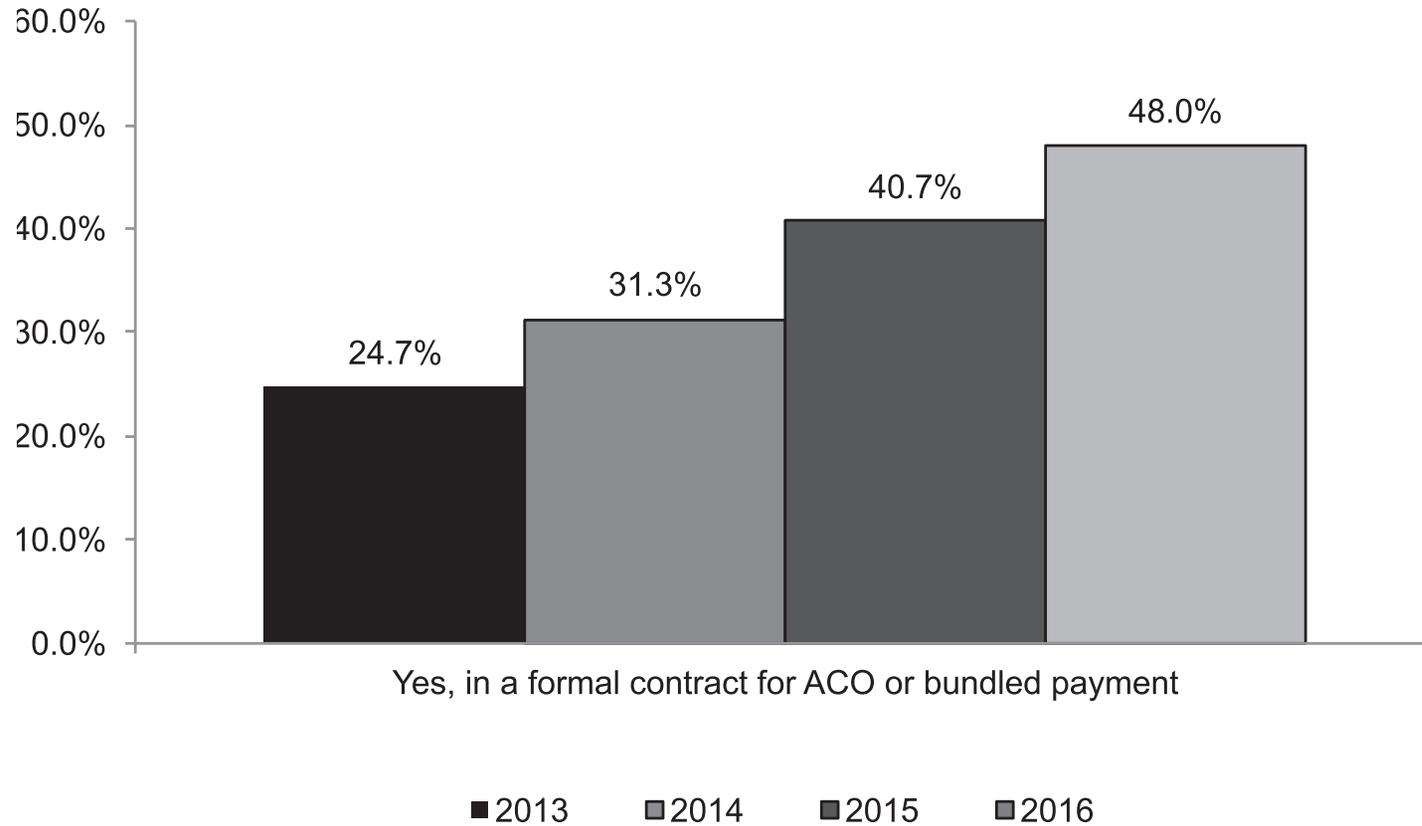
4-20b TYPE OF JOINT VENTURE

Type of JV/With Whom	
Most Mentions	# of Mentions
Hospital/Health System	34
Another NFP Senior Living Provider	32
Home Health/Home Care	21
Physican's Group	10
HUD/Affordable Housing	9
Rehabilitation/Therapy	8
Hospice	5
PACE	4
Pharmacy	3
Case Management	3

4-20 2017 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 is focused on the ways the LZ 150s have grown and changed throughout their histories. Last year's Largest 10 LZ 150 providers included three new multi-sites: Benedictine Health, Ascension Senior Living, and Trinity Senior Living Communities. Due to incomplete data for these organizations to the new list, the historical pace of growth charts were excluded from this year's publication.

Pace of Growth: The Largest 25

Pace of Growth charts (Charts 5-2a-r) trace the growth patterns of 18 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. Seven of the largest 25 organizations of the LZ 150 were excluded because of insufficient detail: ELGSS (LZ 150 #2), Benedictine Health (LZ 150 #5), Ascension Senior Living (LZ 150 #8), Trinity Senior Living Communities (LZ 150 #9), Presence Life Connections (LZ 150 #16), The Carmelite System (LZ 150 #18), and Ecumen (LZ 150 #25). The Pace of Growth charts show the different methods of change the systems are employing. Significant new community construction and expansions are noted, with the addition of the second community highlighted in a dashed box. Mergers and acquisitions (gray-framed box) and dispositions (bold black box) are also highlighted.

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

Aggregate Growth

Section 5-3 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 2015 and 2016, 2000 and 2016, and 1990 and 2016 (Charts 5-3a-c).

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

Future Growth Plans

Arguably, much information can be gathered about potential future growth, whether it would be in the form of bricks-and-mortar or expanding home and community-based services. For purposes of the LZ 150, feedback is gathered on the intent to grow through affiliation, new campus development, or expansion in the next two years. More than 75% of the LZ 150 reported intentions to expand or reposition an existing campus in 2017 or 2018. Approximately 32% reported that they intend to grow via the construction of new communities or from affiliation. Another 30% responded “maybe” to this growth in 2017 or 2018.

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

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

Properties have been classified according to the following definitions:

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

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

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

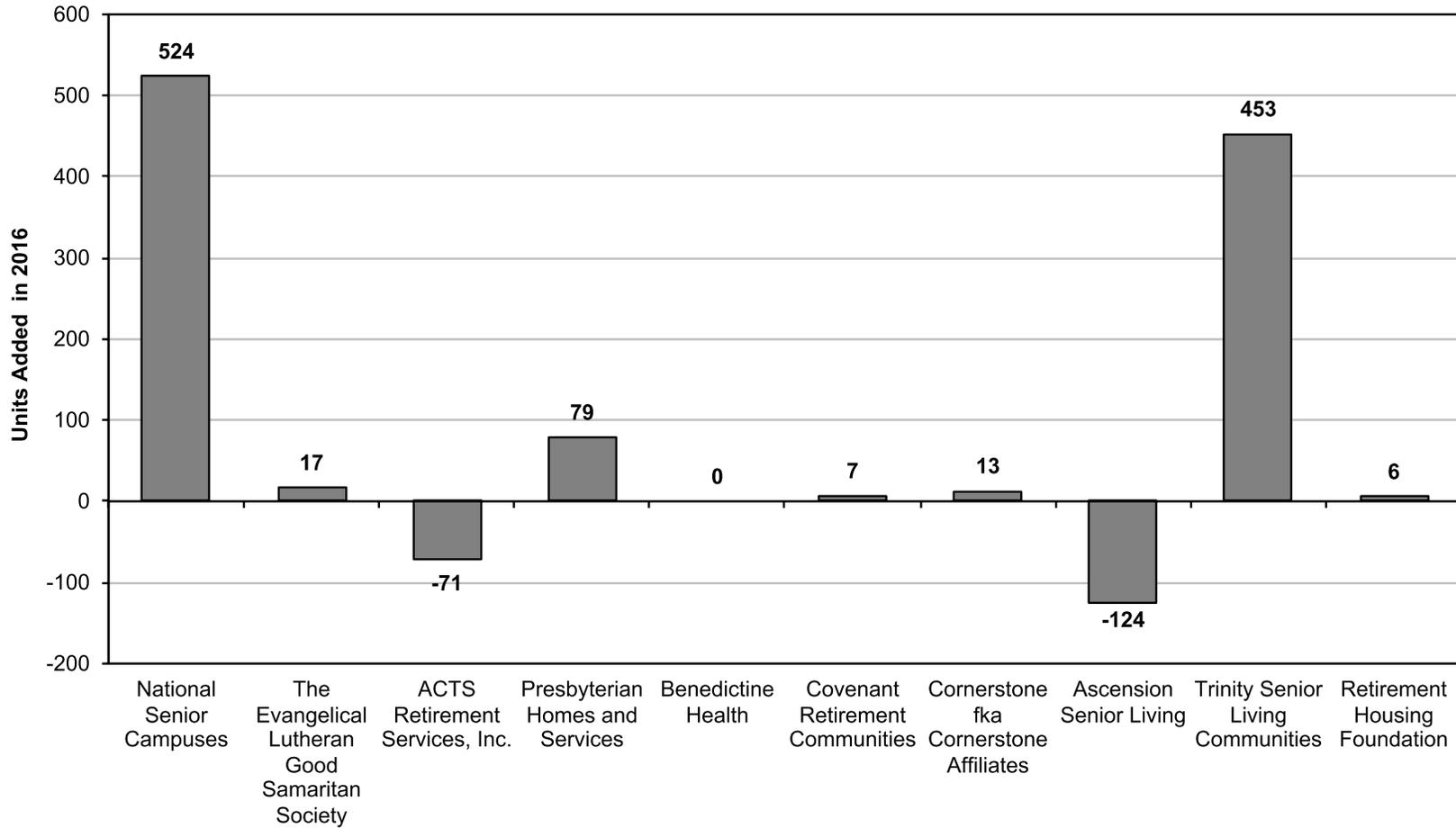
Disposition: The sale or closure of a community.

The charts at 5-6a-c analyze how communities have changed through the above-described venues over a 10, 20, and greater than 30-year period (1980-2016). More than 1,170 communities have been added from campus expansion since 1980 (Chart 5-8a). Dispositions have also increased dramatically. Of the 205 community dispositions that occurred from 1980-2016 among the LZ 150 (Chart 5-6a), more than 177 of these dispositions occurred in approximately the last decade (Chart 5-6c). The most common dispositions in recent years have been free-standing nursing homes or assisted living and financially distressed Life Plan Communities.

Charts 5-7a-j 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, and the largest 150). The second of each pair of charts shows the incremental change of the multi-sites, that is, how many existing properties have experienced expansion; how many properties have been added through new community construction or through merger, acquisition and/or affiliation; and how many properties have been lost through disposition each year. For the incremental growth charts, the final five-year period is provided with the current year shown alone. The cumulative growth charts provide the number of properties added or lost through each of these methods through the period shown.

5-1 2017 LeadingAge Ziegler 150

Growth: Growth of Largest 10 Systems

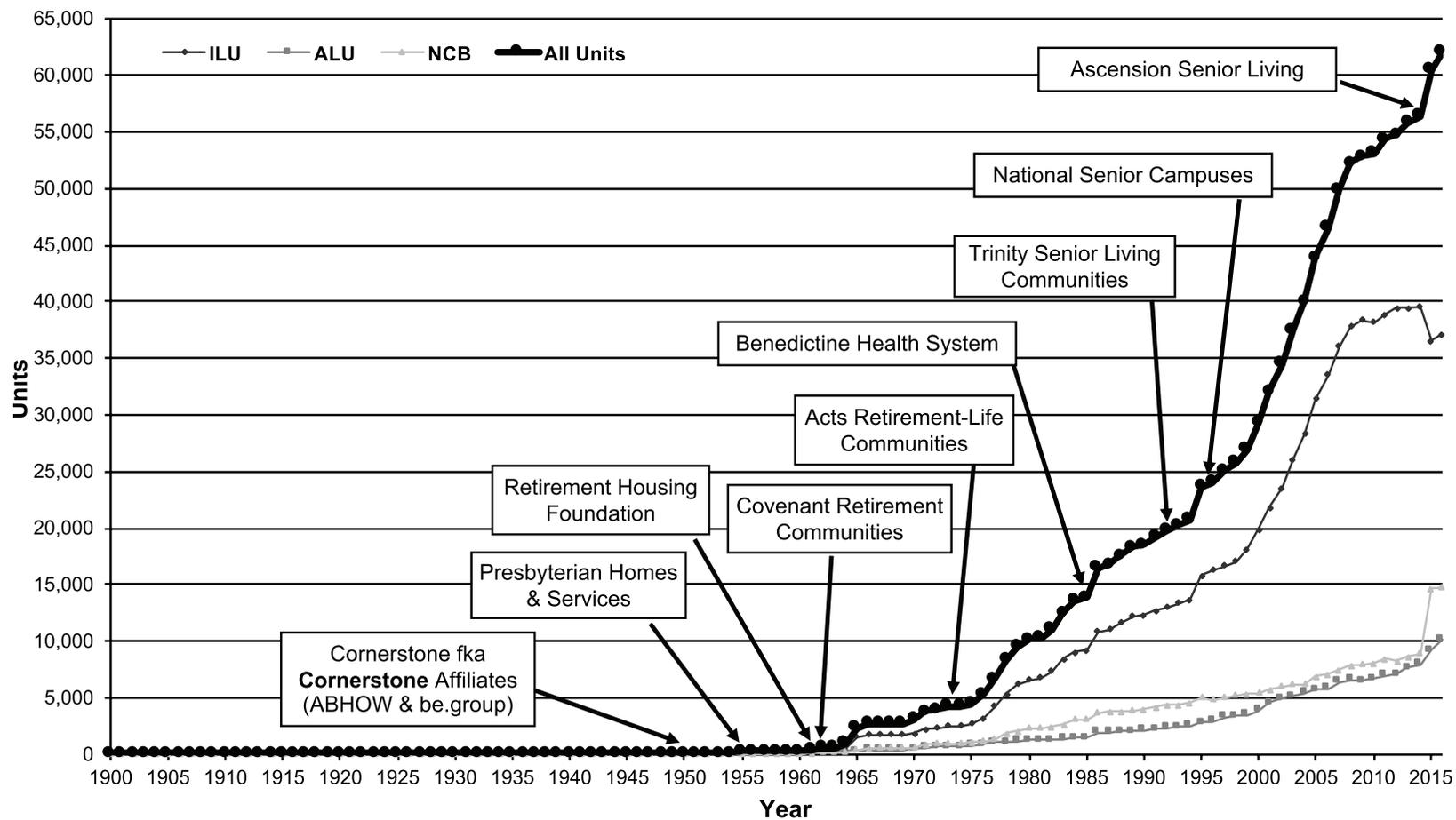


LeadingAge **150** Ziegler

5-1 2017 LeadingAge Ziegler 150

Growth: Growth of Largest 10 Systems, Combined Unit Mix

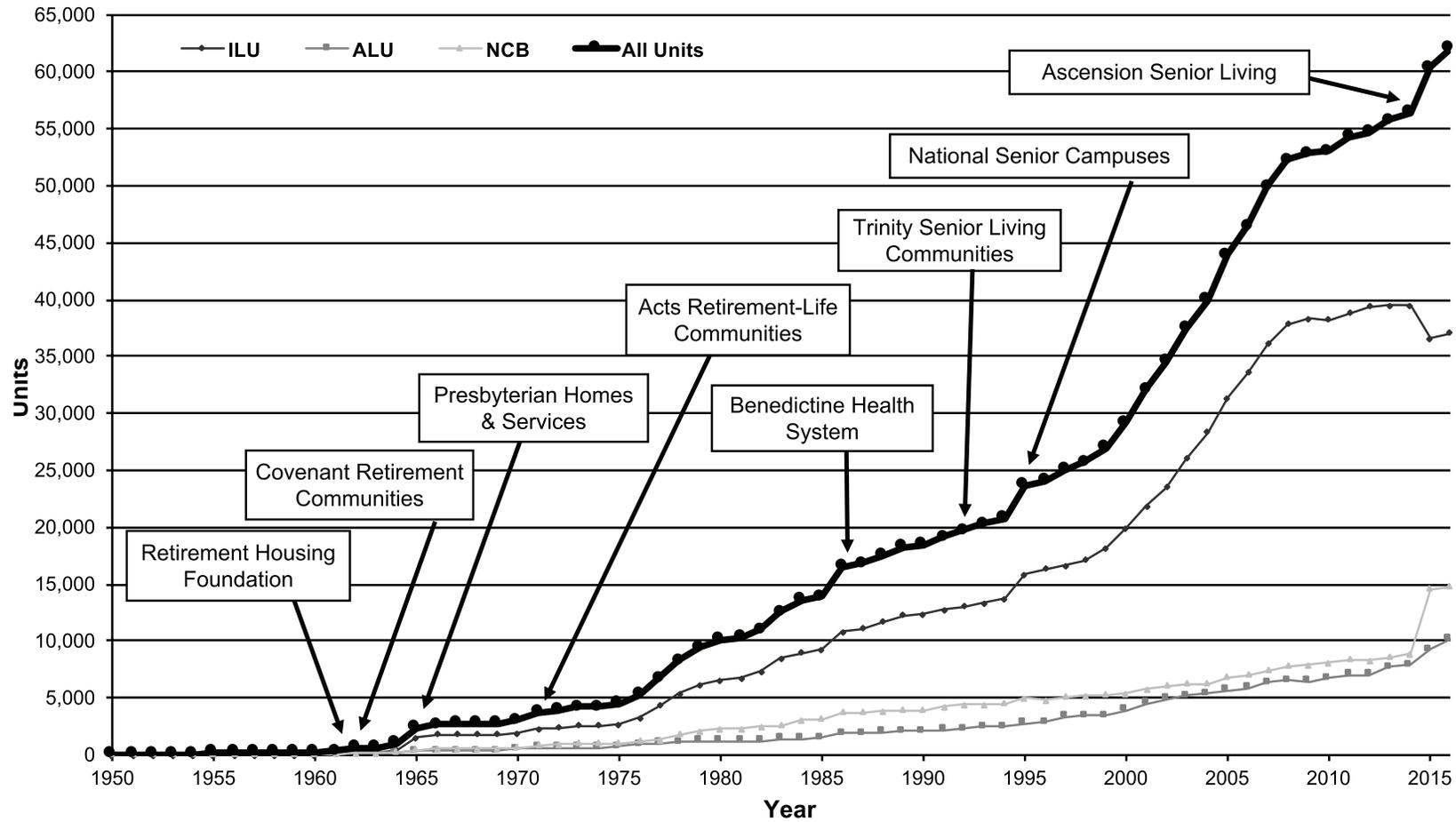
5-1a FROM 1900 (Excludes Evangelical Lutheran Good Samaritan Society)



5-1 2017 LeadingAge Ziegler 150

Growth: Growth of Largest 10 Systems, Combined Unit Mix

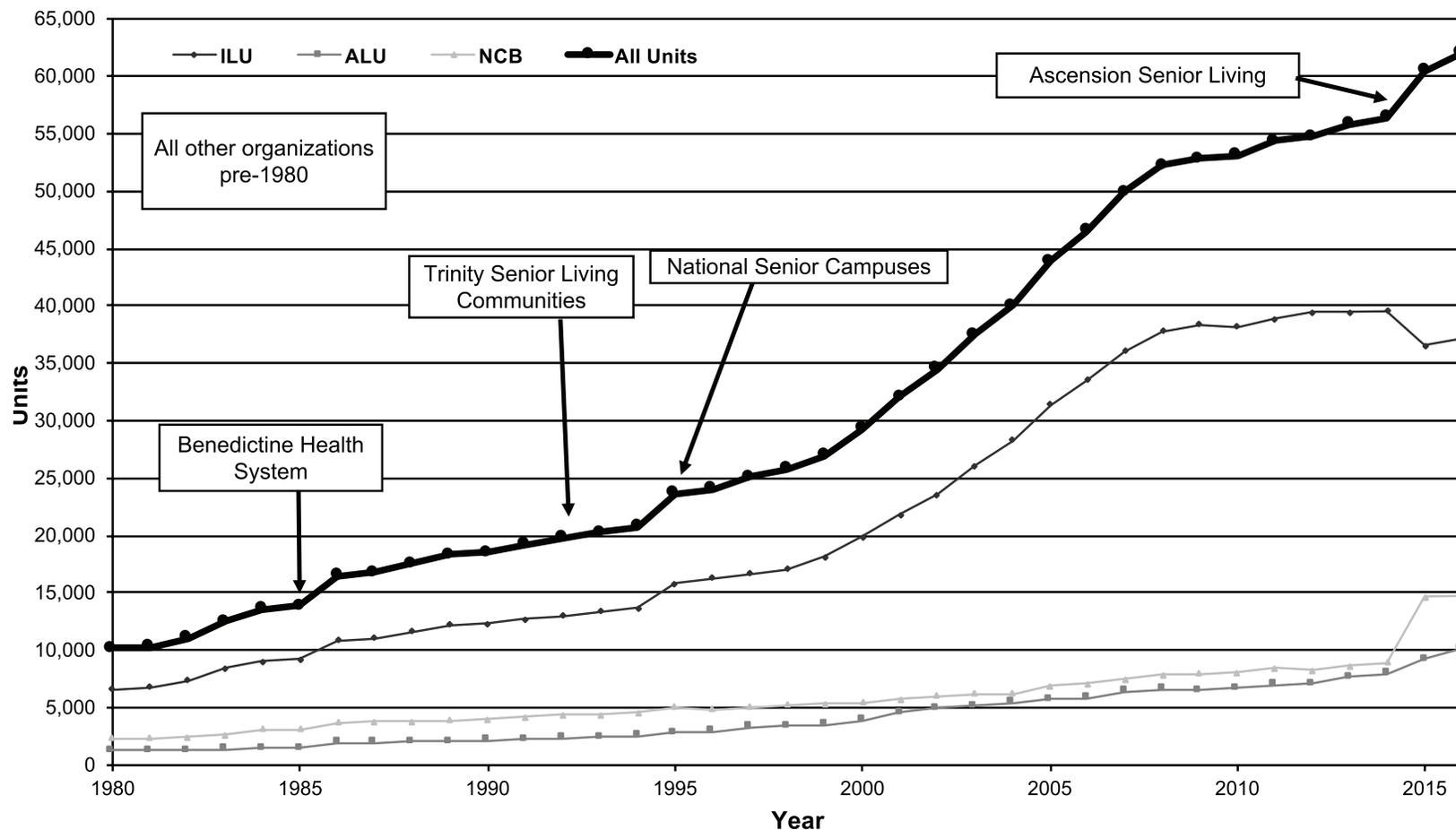
5-1b FROM 1950 (Excludes Evangelical Lutheran Good Samaritan Society)



LeadingAge 150 Ziegler

5-1 2017 LeadingAge Ziegler 150

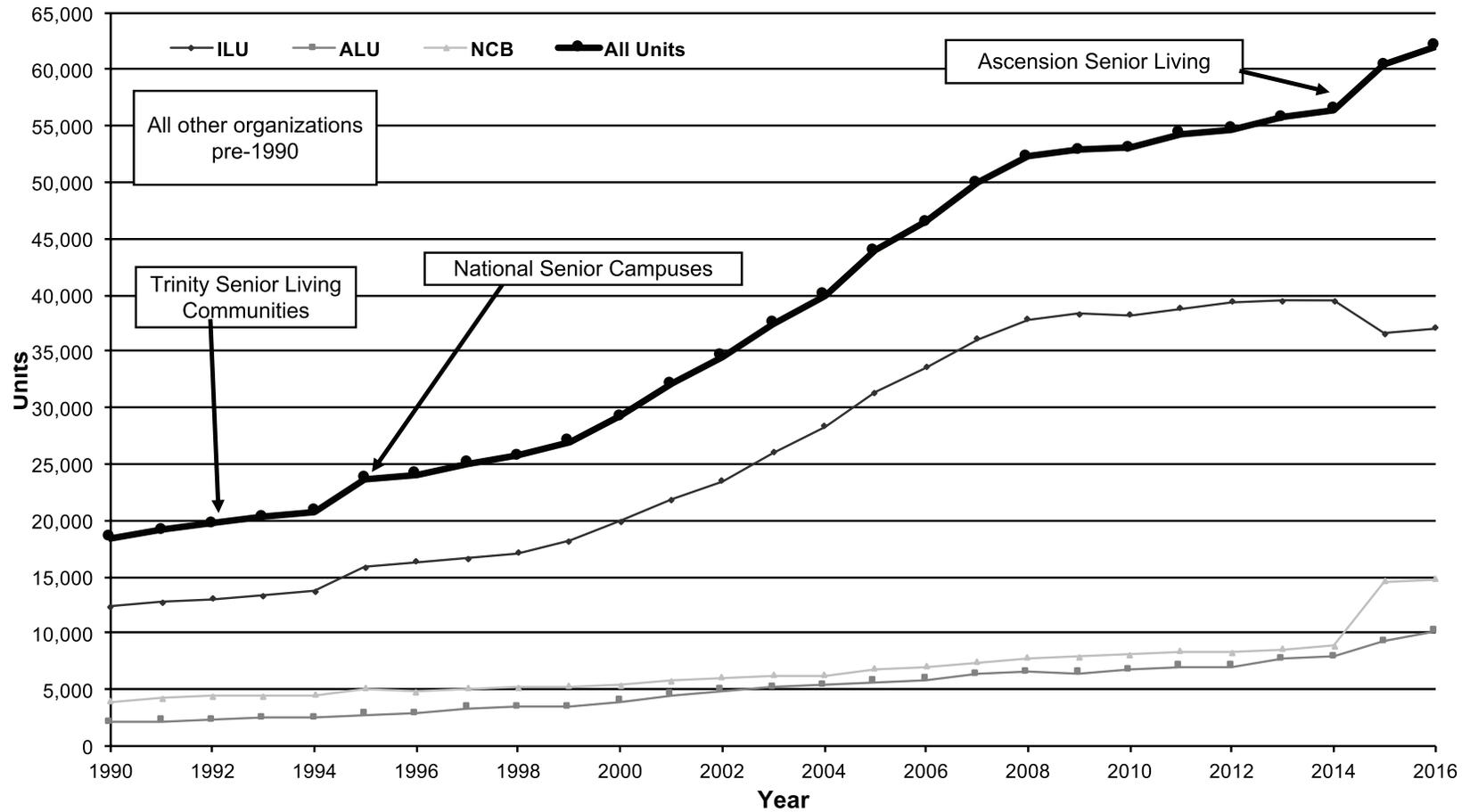
Growth: Growth of Largest 10 Systems, Combined Unit Mix
5-1c FROM 1980 (Excludes Evangelical Lutheran Good Samaritan Society)



5-1 2017 LeadingAge Ziegler 150

Growth: Growth of Largest 10 Systems, Combined Unit Mix

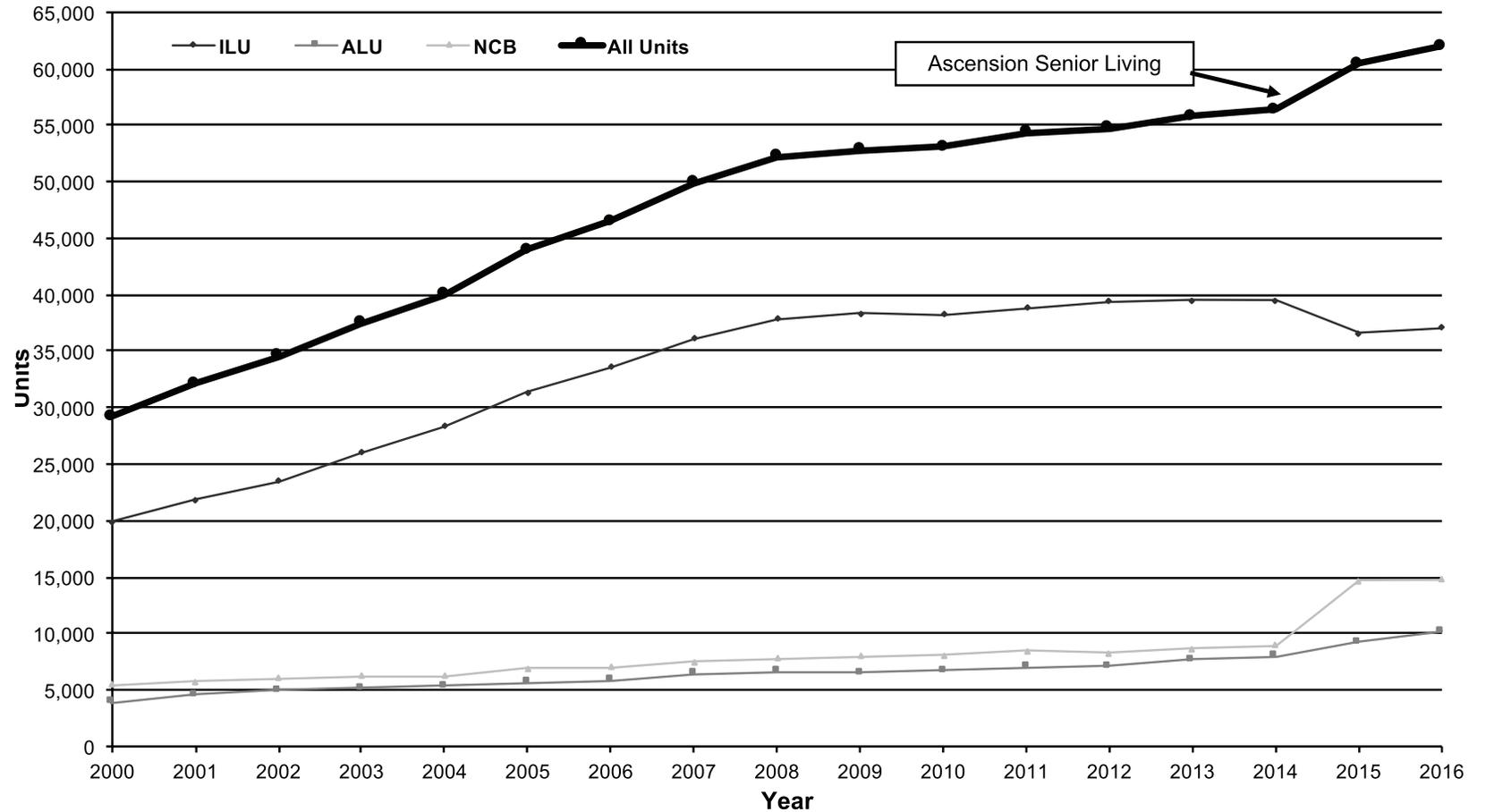
5-1d FROM 1990 (Excludes Evangelical Lutheran Good Samaritan Society)



LeadingAge 150 Ziegler

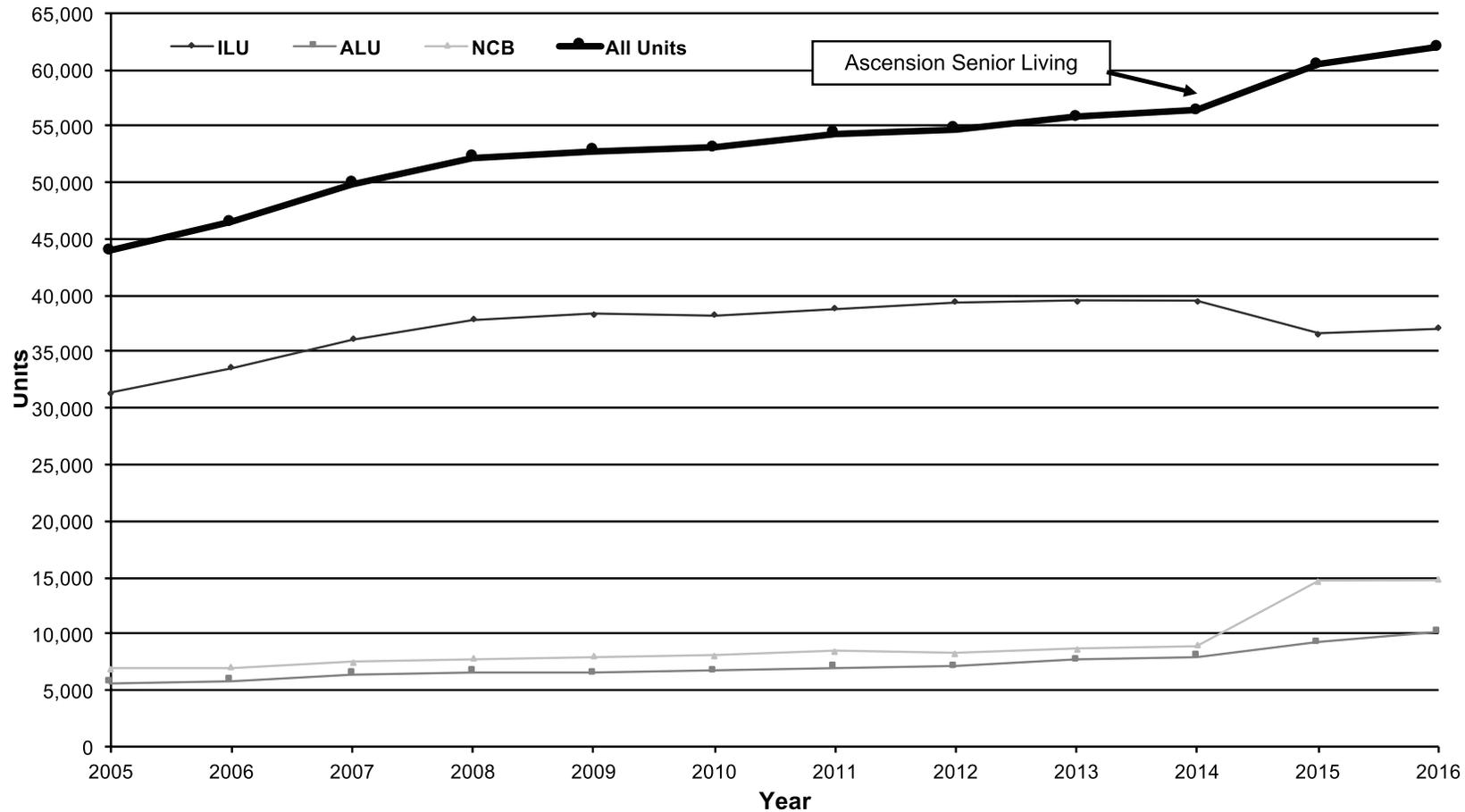
5-1 2017 LeadingAge Ziegler 150

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



5-1 2017 LeadingAge Ziegler 150

Growth: Growth of Largest 10 Systems, Combined Unit Mix
 5-1f FROM 2005 (Excludes Evangelical Lutheran Good Samaritan Society)



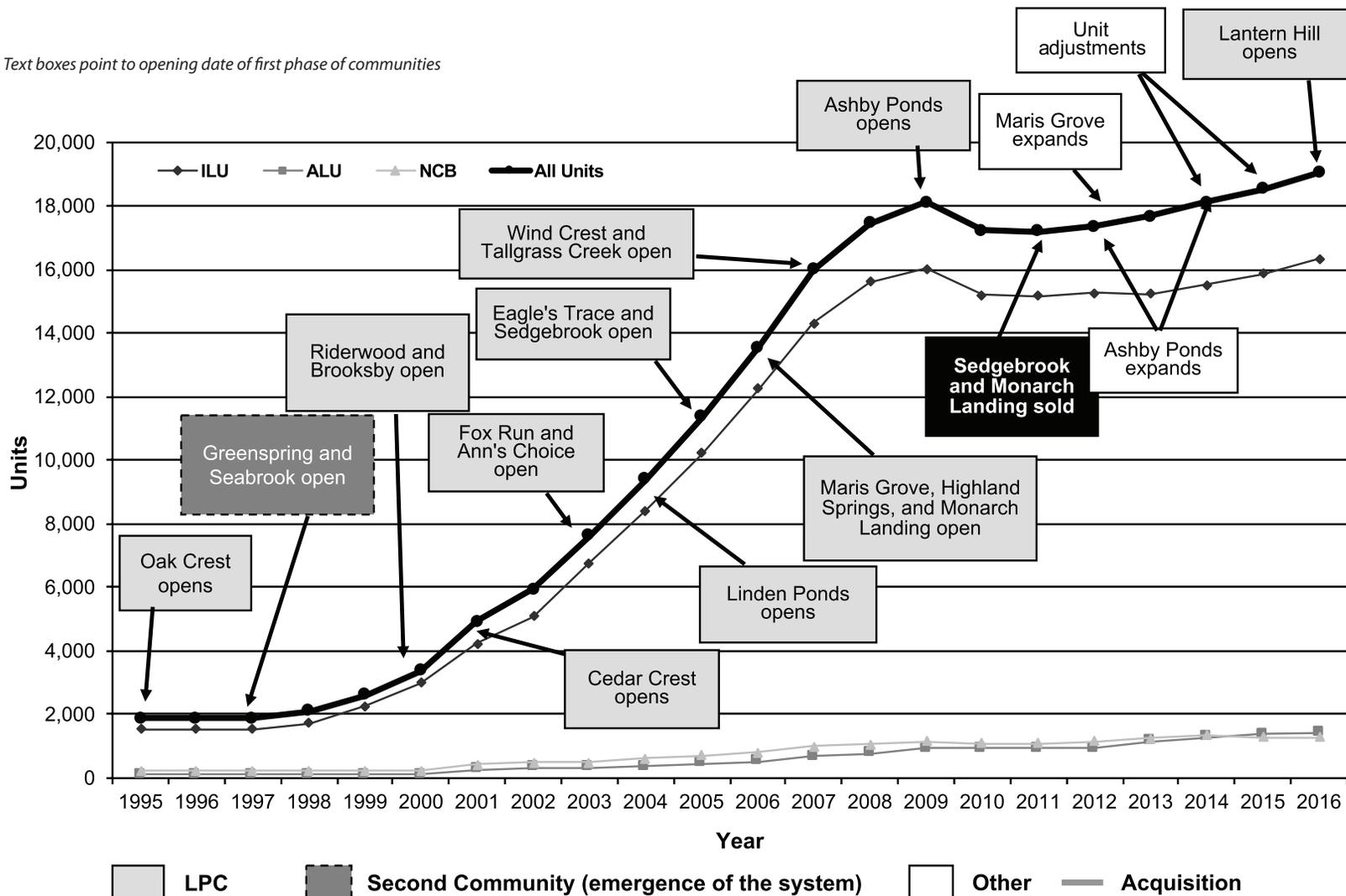
LeadingAge 150 Ziegler

5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2a NATIONAL SENIOR CAMPUSES (MD)

Text boxes point to opening date of first phase of communities

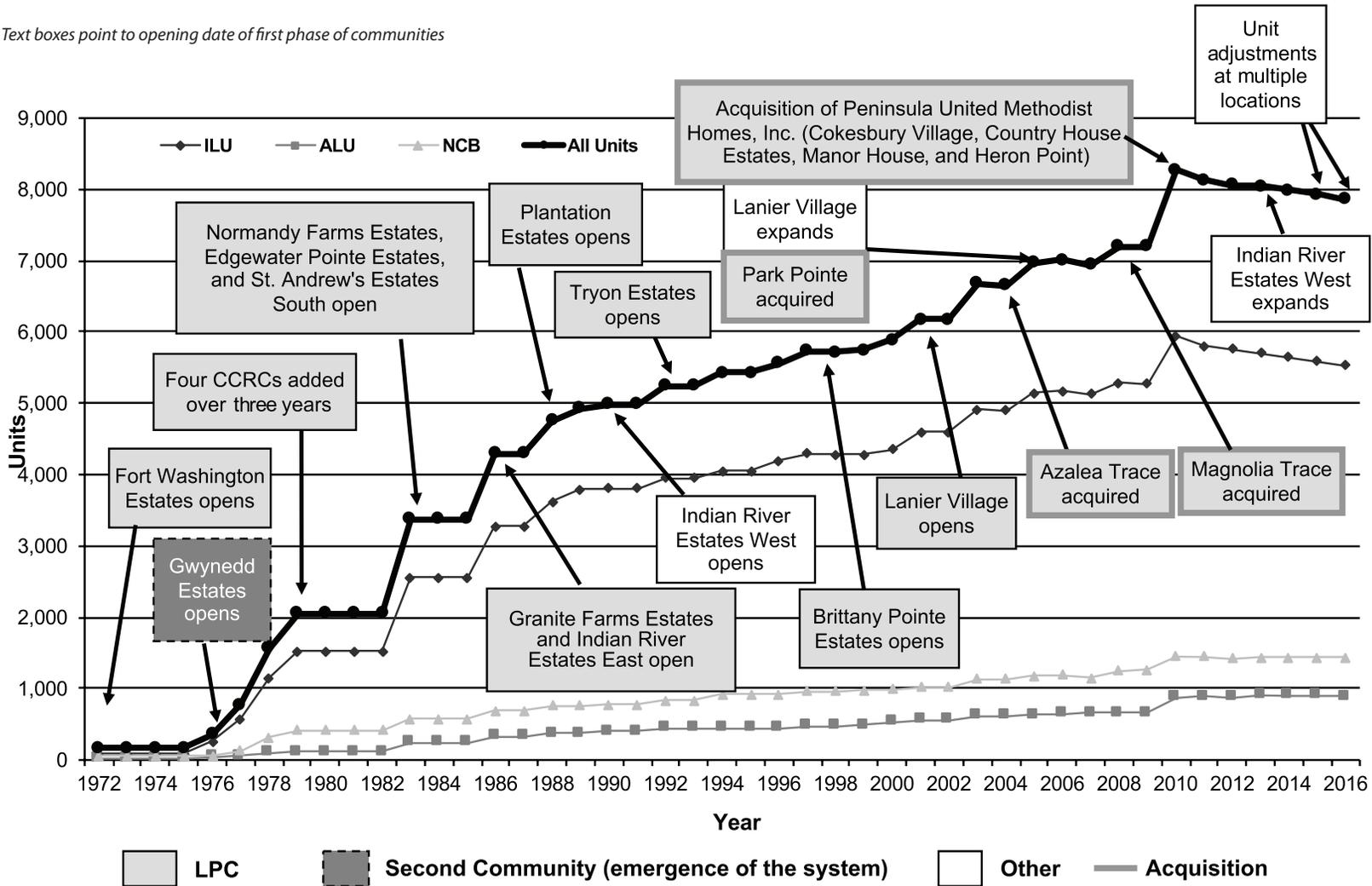


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2b ACTS RETIREMENT-LIFE COMMUNITIES (PA)

Text boxes point to opening date of first phase of communities



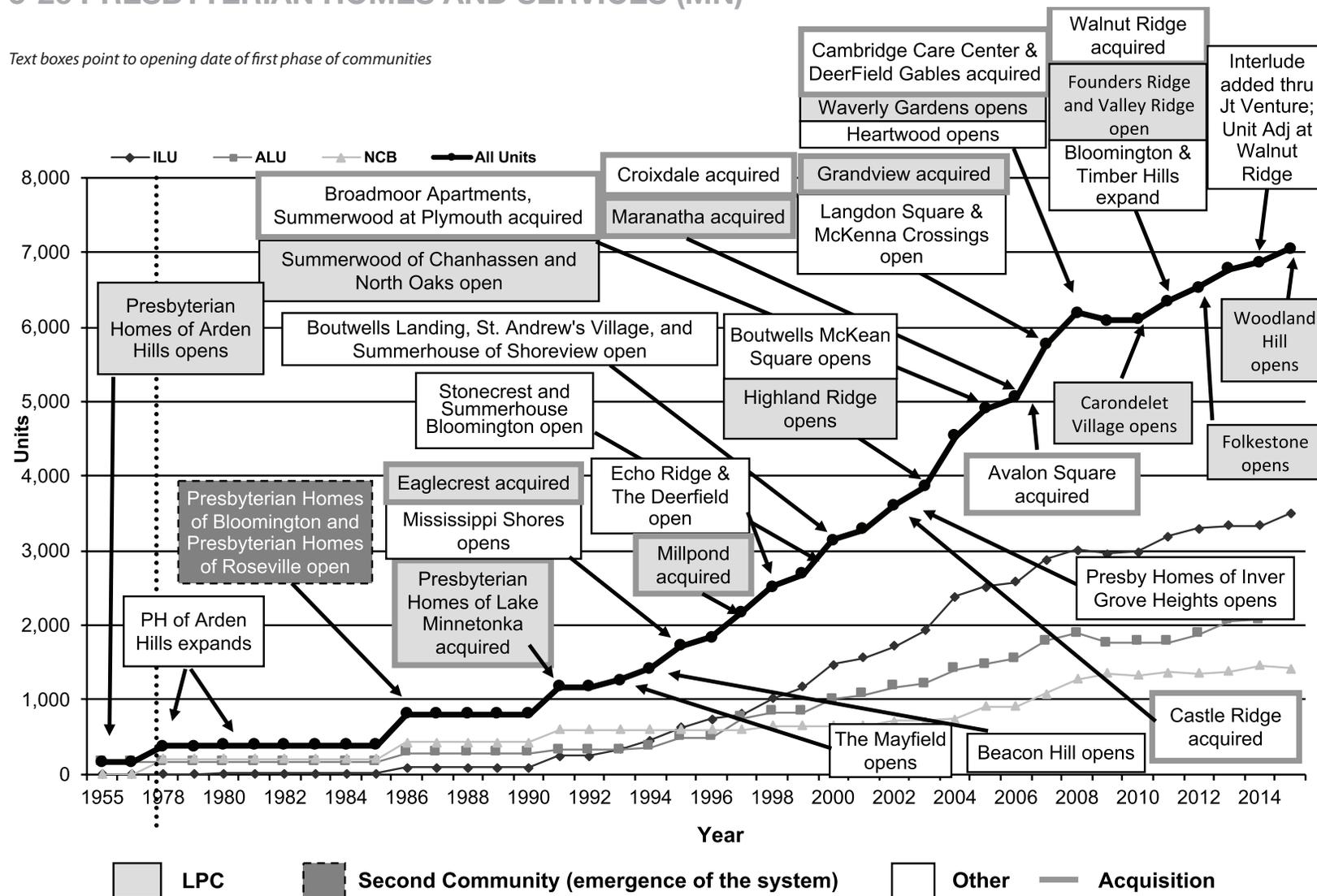
LeadingAge 150 Ziegler

5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2c PRESBYTERIAN HOMES AND SERVICES (MN)

Text boxes point to opening date of first phase of communities

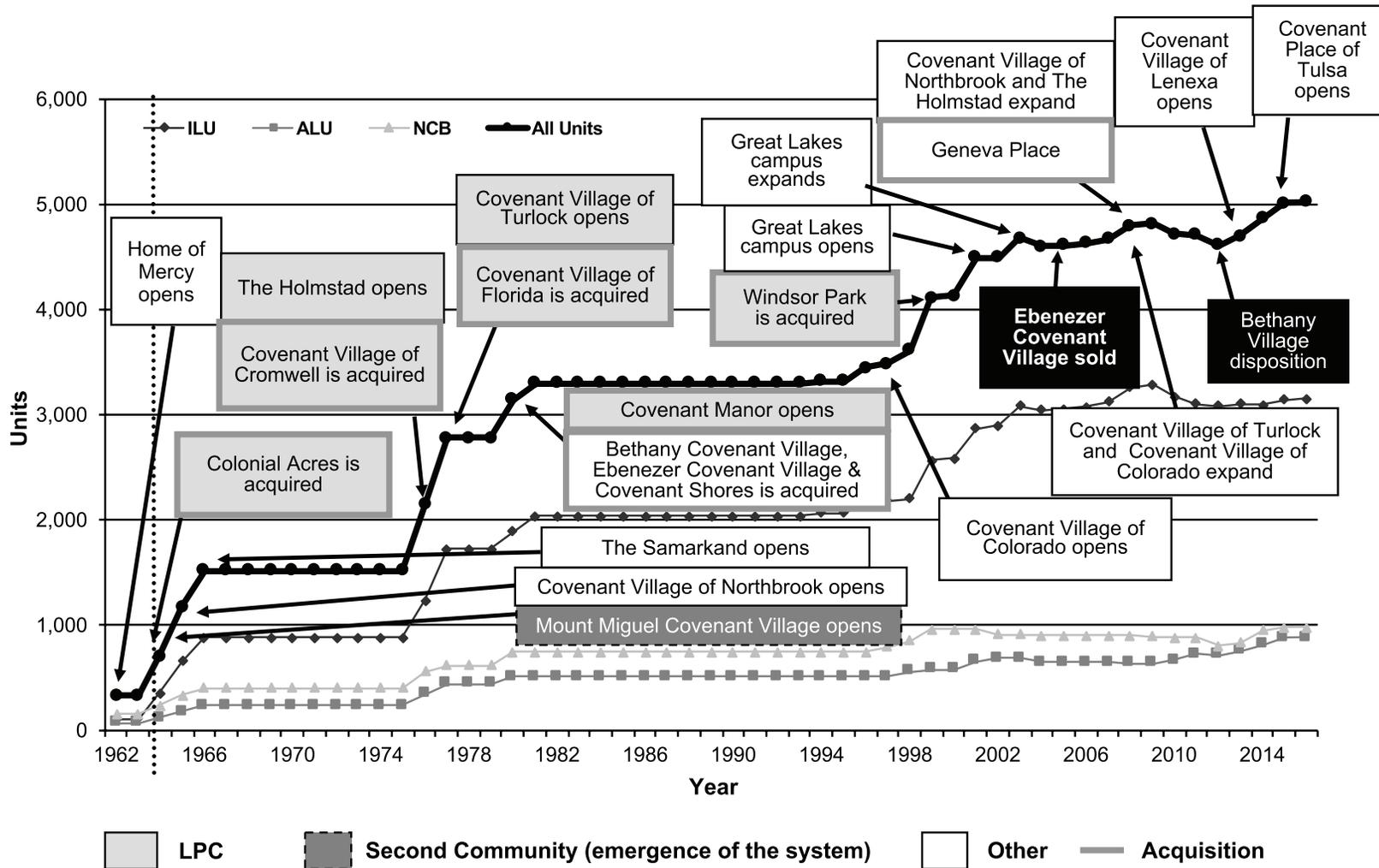


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2d COVENANT RETIREMENT COMMUNITIES (IL)

Text boxes point to opening date of first phase of communities

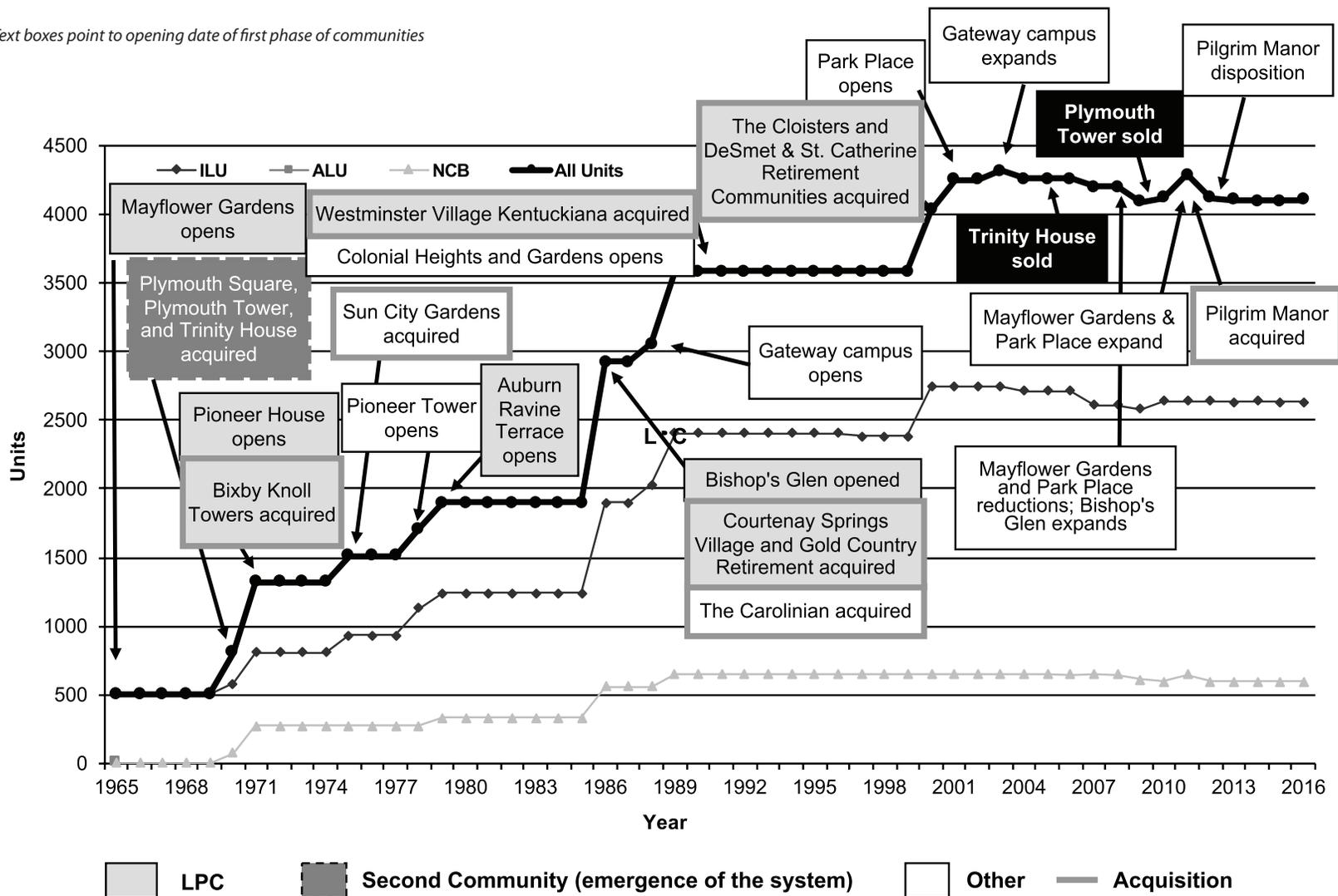


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2e RETIREMENT HOUSING FOUNDATION (CA)

Text boxes point to opening date of first phase of communities

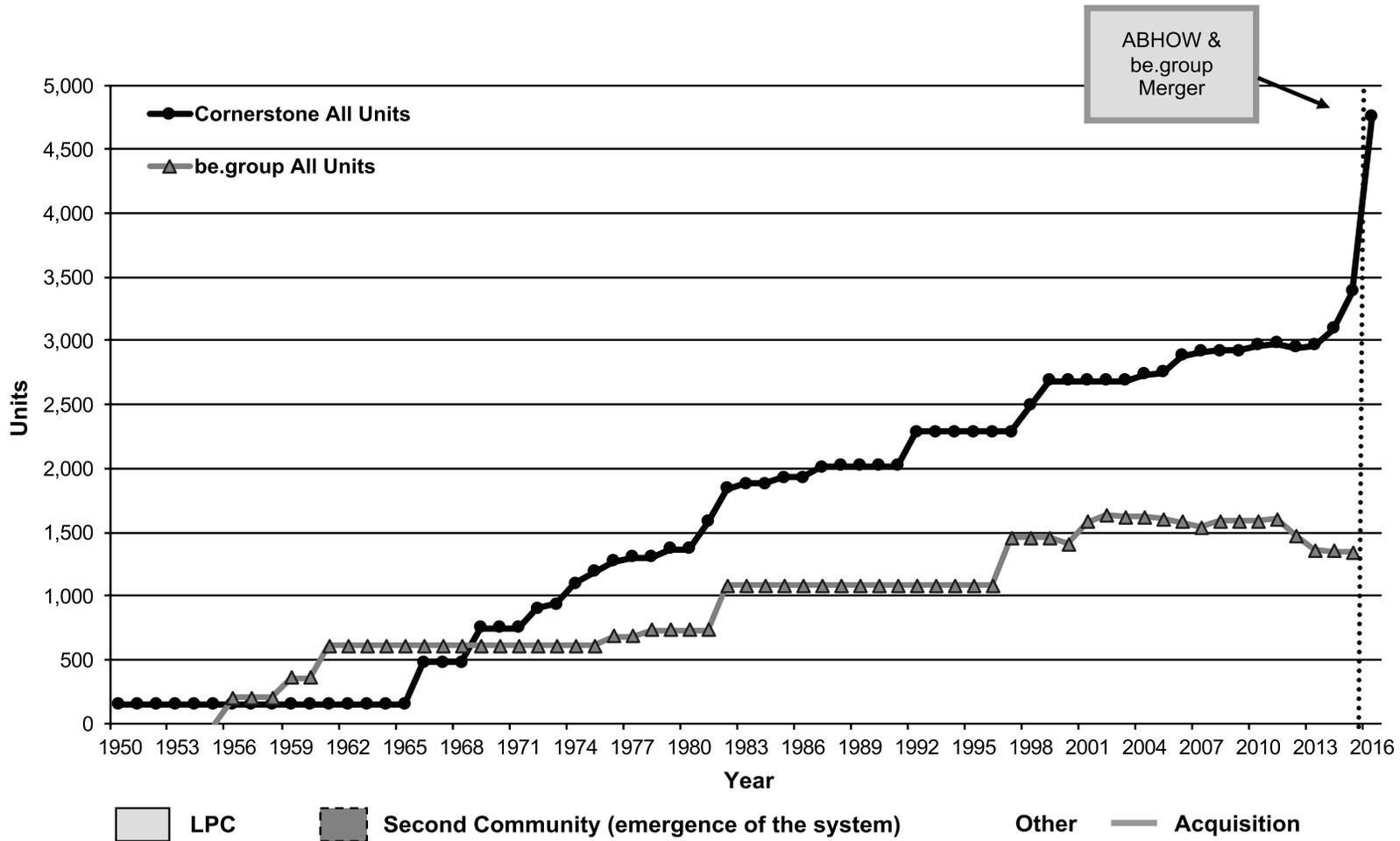


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2f HUMANGOOD FKA CORNERSTONE (ABHOW & be.group) (CA)

Text boxes point to opening date of first phase of communities

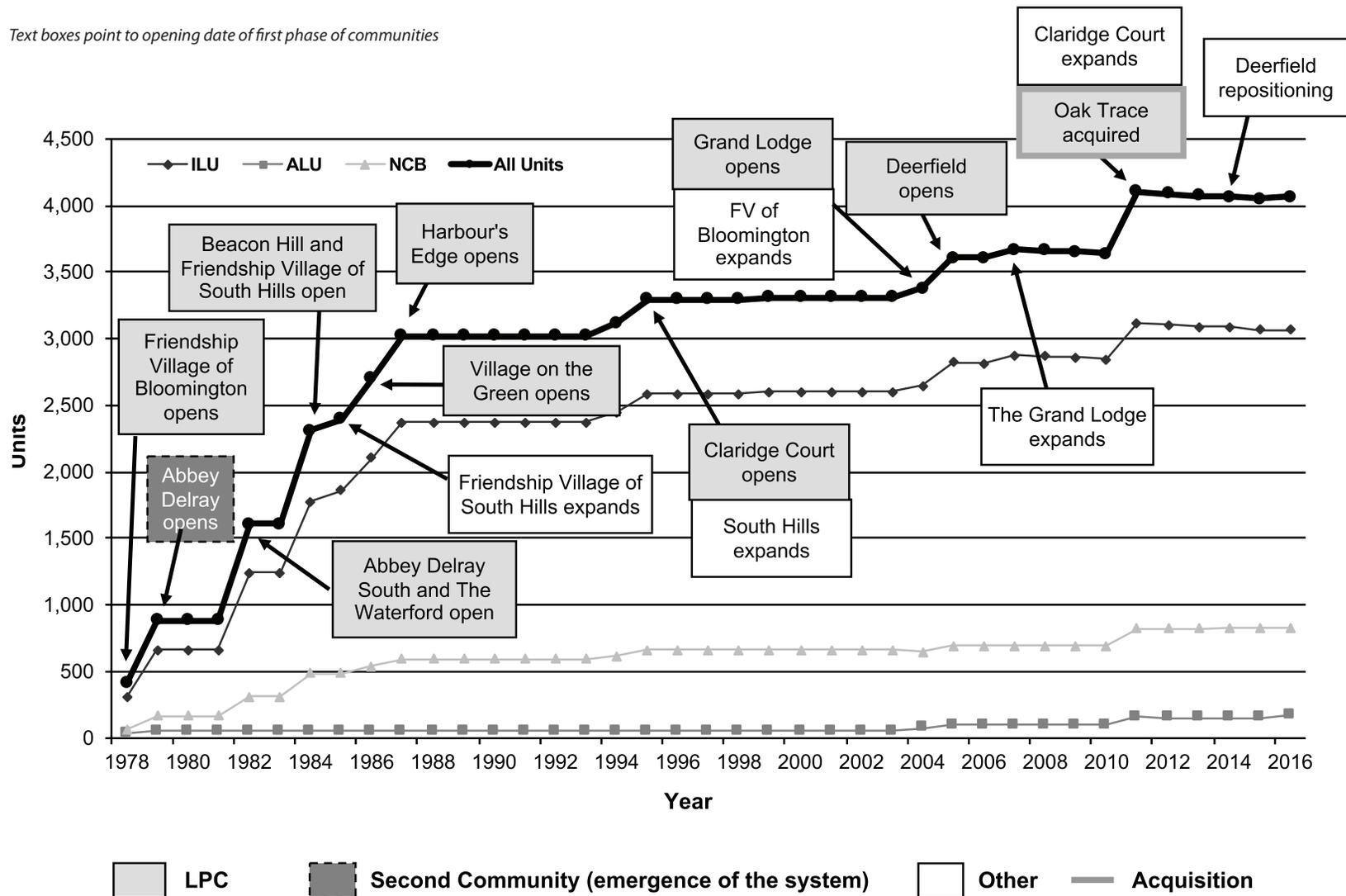


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2g LIFESPACE COMMUNITIES, INC. (IA)

Text boxes point to opening date of first phase of communities

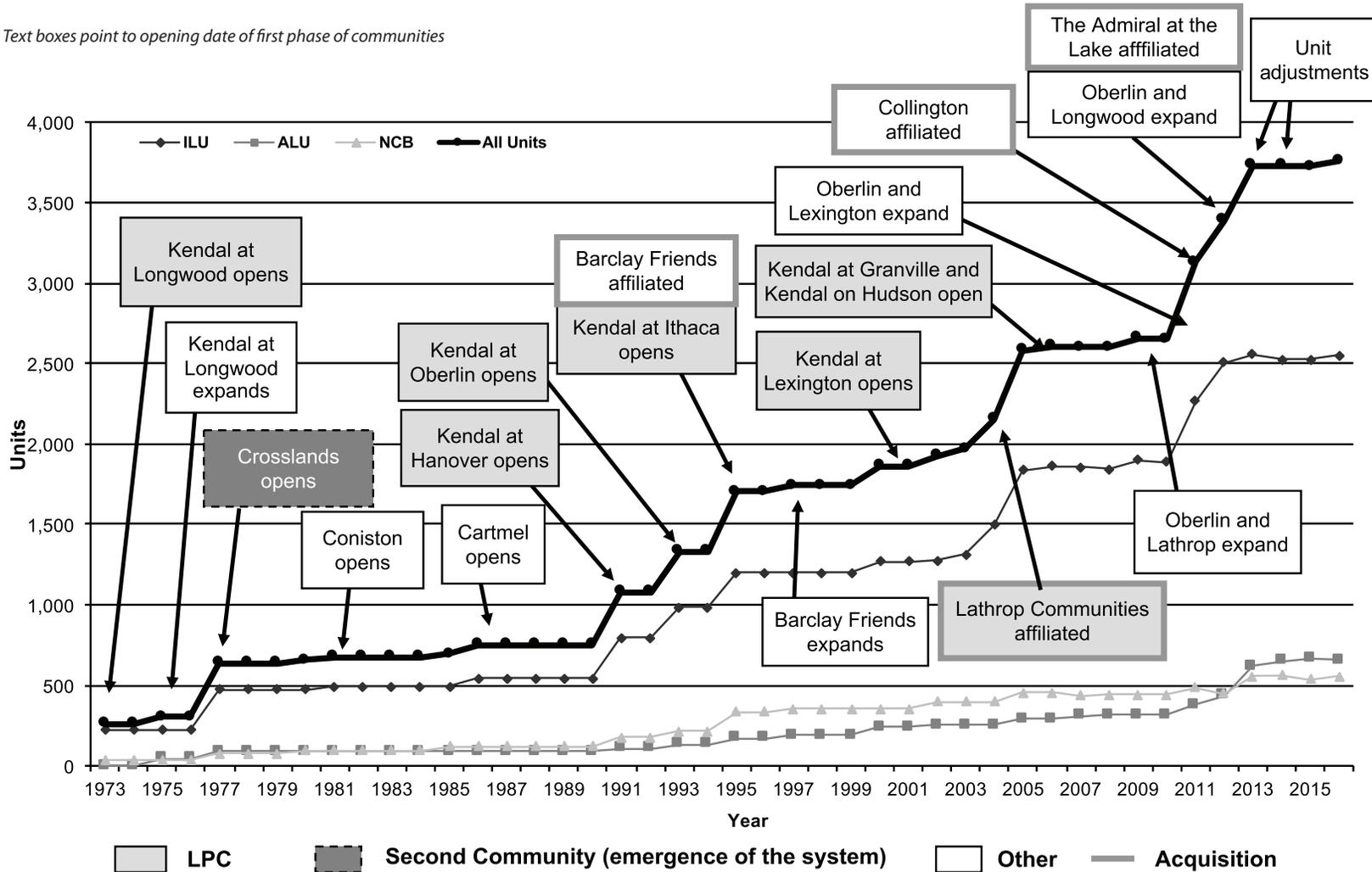


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2h THE KENDAL CORPORATION (PA)

Text boxes point to opening date of first phase of communities

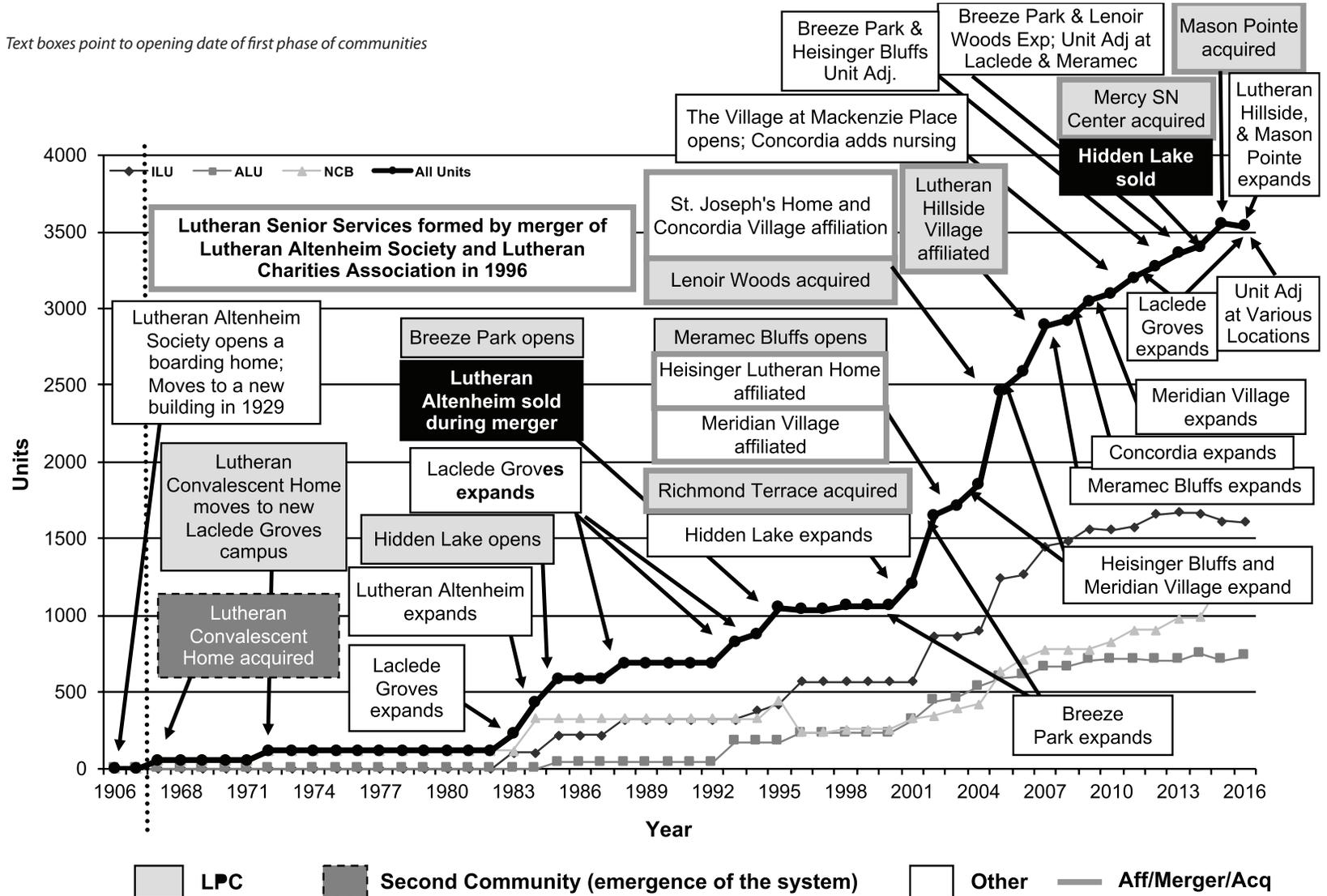


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2i LUTHERAN SENIOR SERVICES (MO)

Text boxes point to opening date of first phase of communities

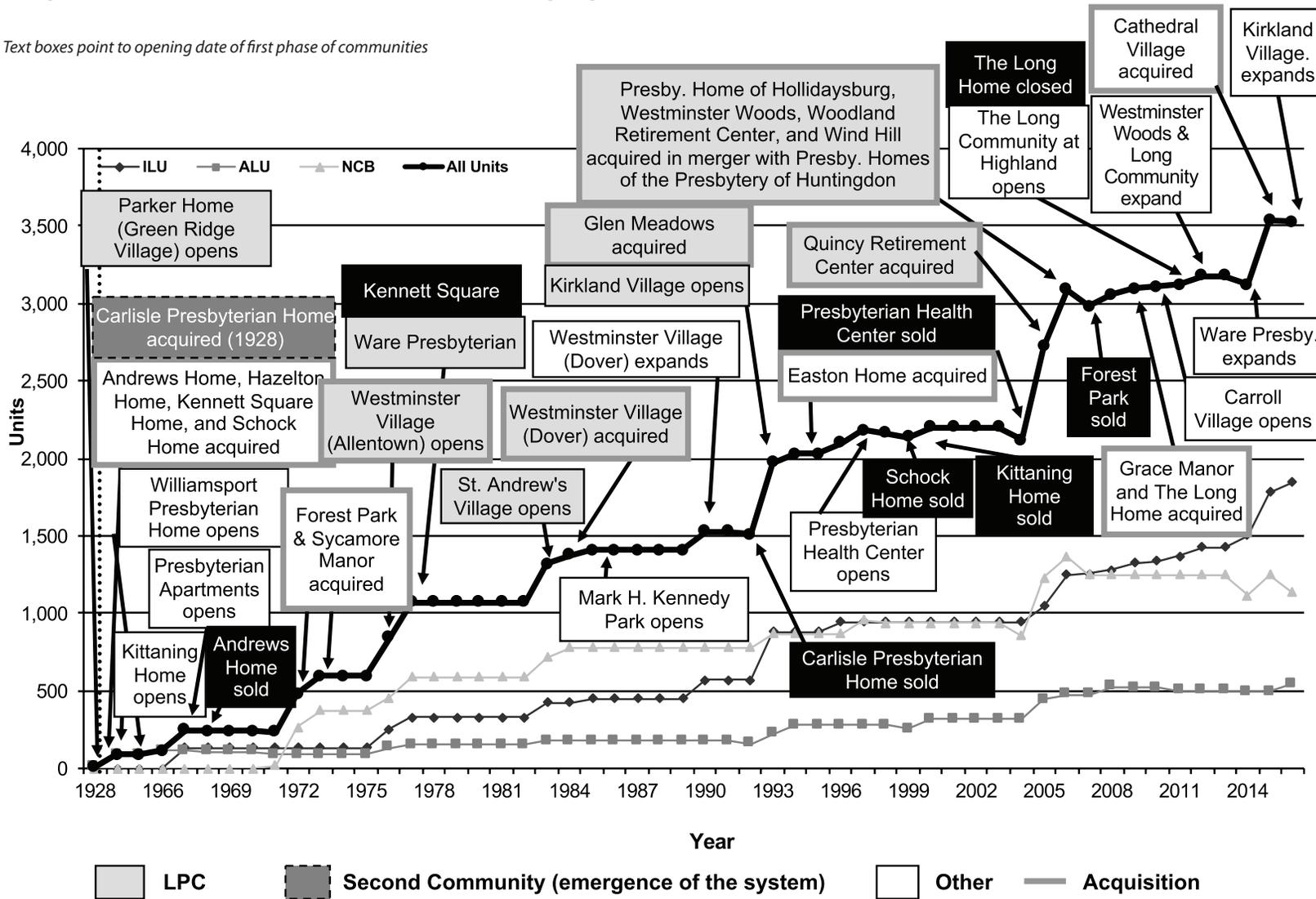


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2j PRESBYTERIAN SENIOR LIVING (PA)

Text boxes point to opening date of first phase of communities

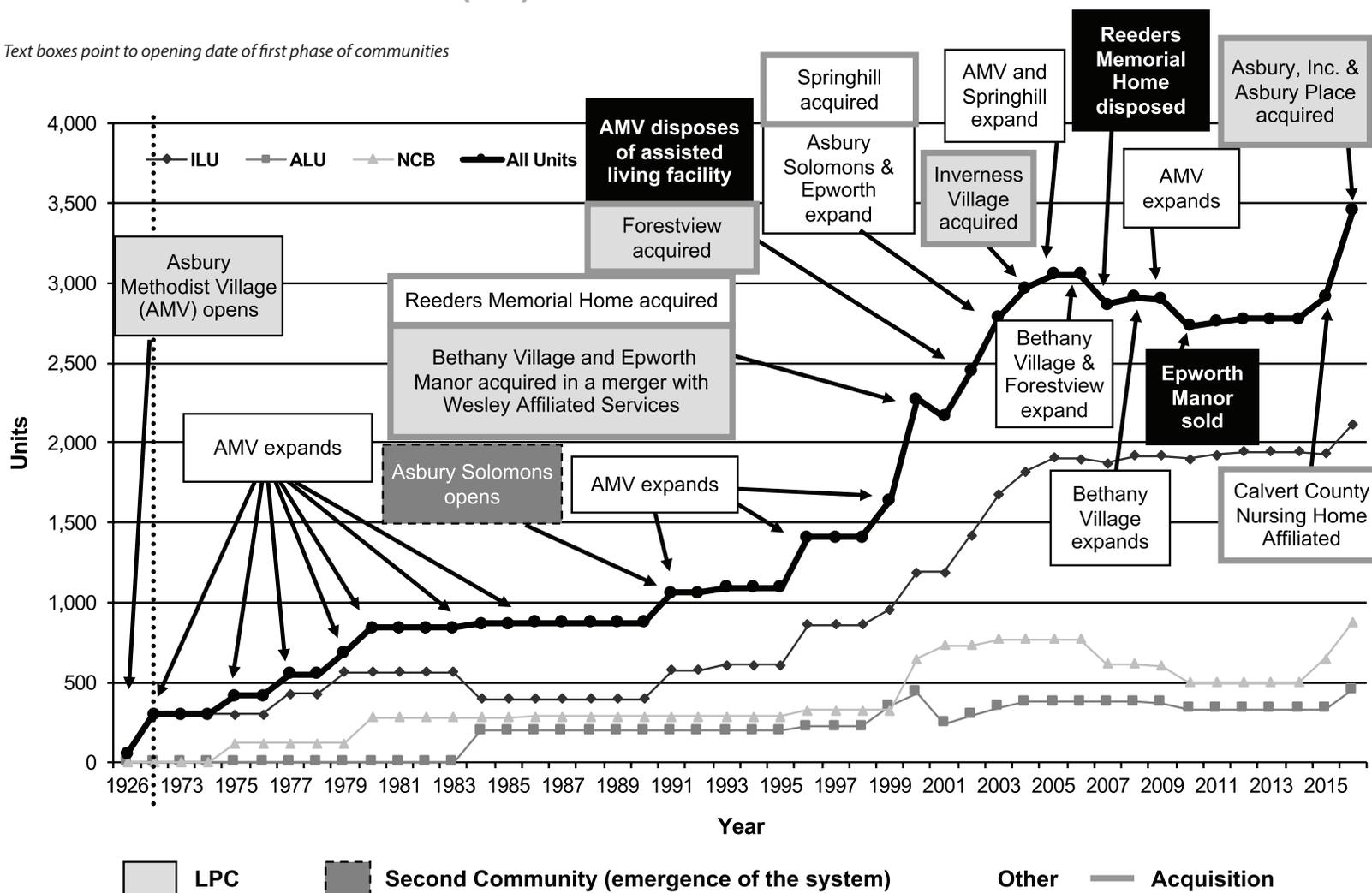


LeadingAge 150 Ziegler

5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth 5-2k ASBURY COMMUNITIES (MD)

Text boxes point to opening date of first phase of communities



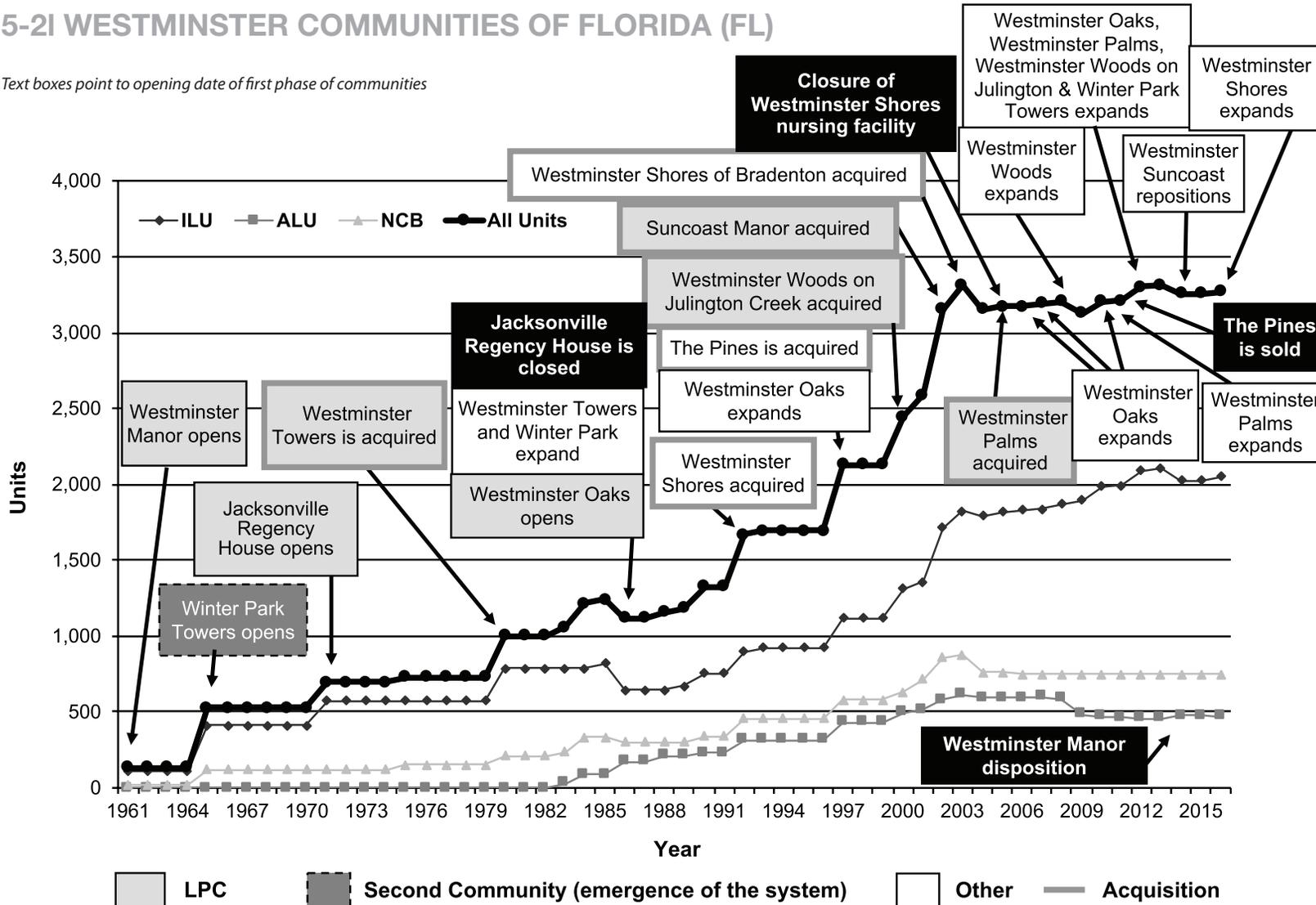
LPC
 Second Community (emergence of the system)
 Other
 Acquisition

5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2I WESTMINSTER COMMUNITIES OF FLORIDA (FL)

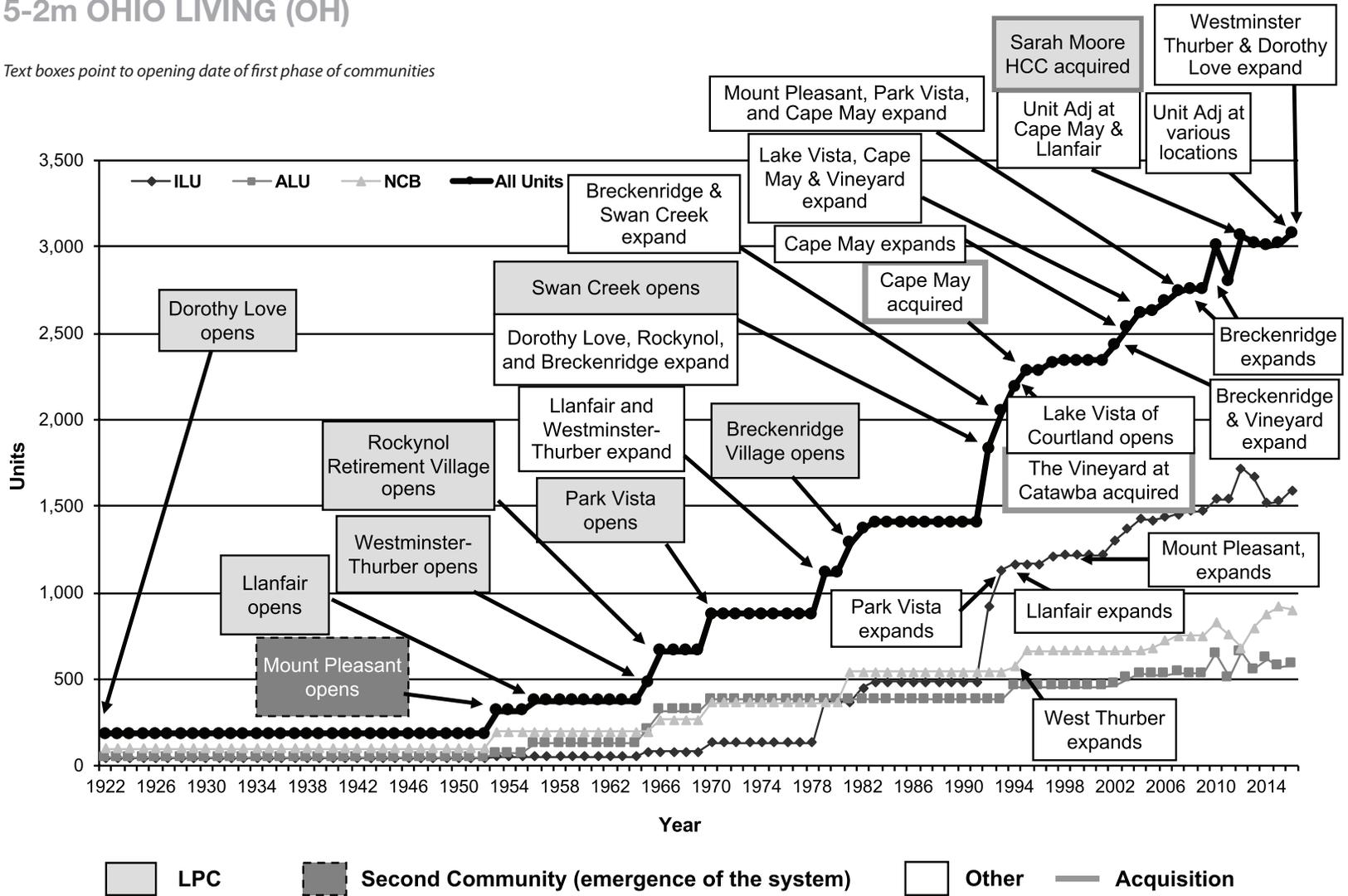
Text boxes point to opening date of first phase of communities



5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth 5-2m OHIO LIVING (OH)

Text boxes point to opening date of first phase of communities

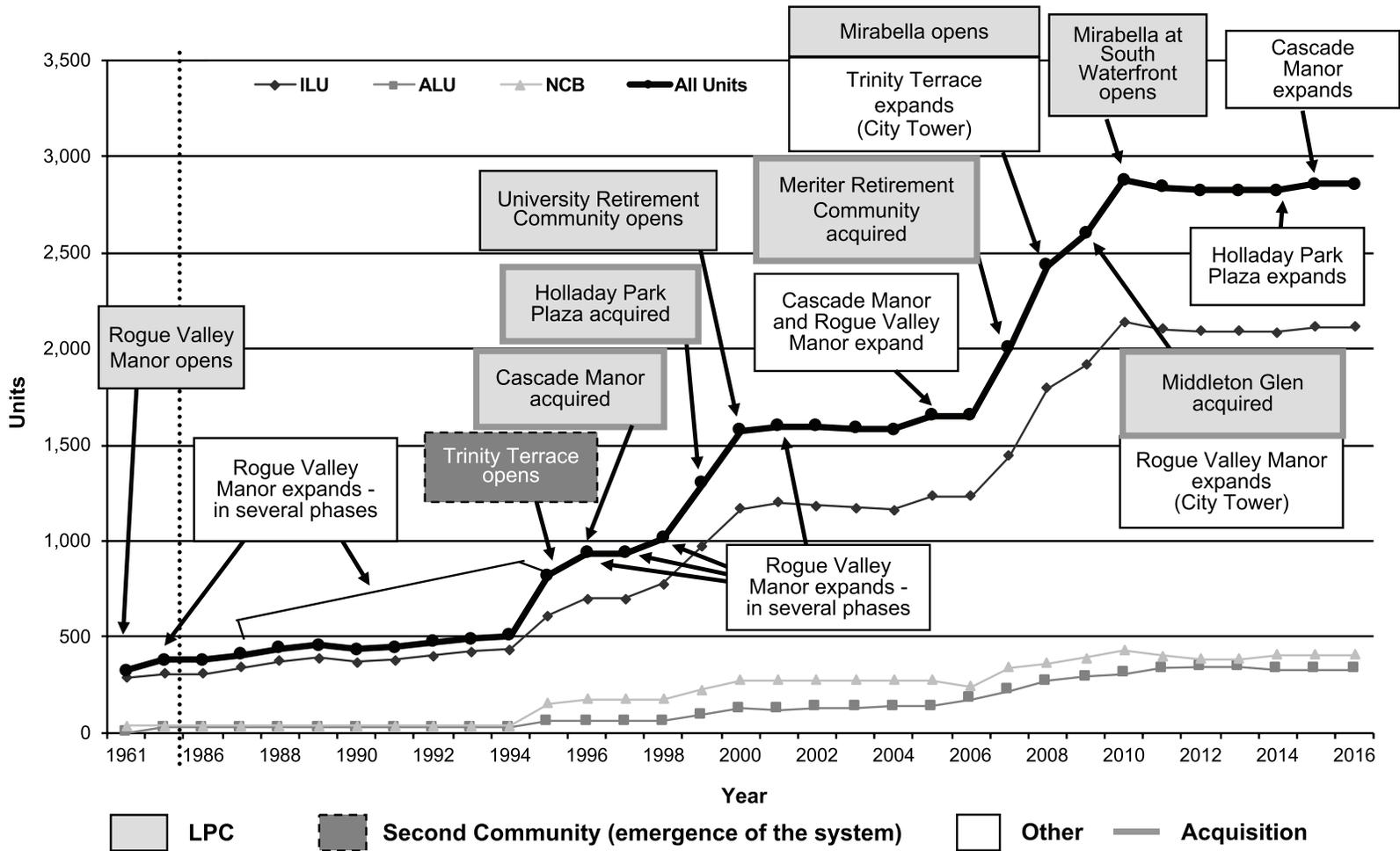


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2n PACIFIC RETIREMENT SERVICES (OR)

Text boxes point to opening date of first phase of communities

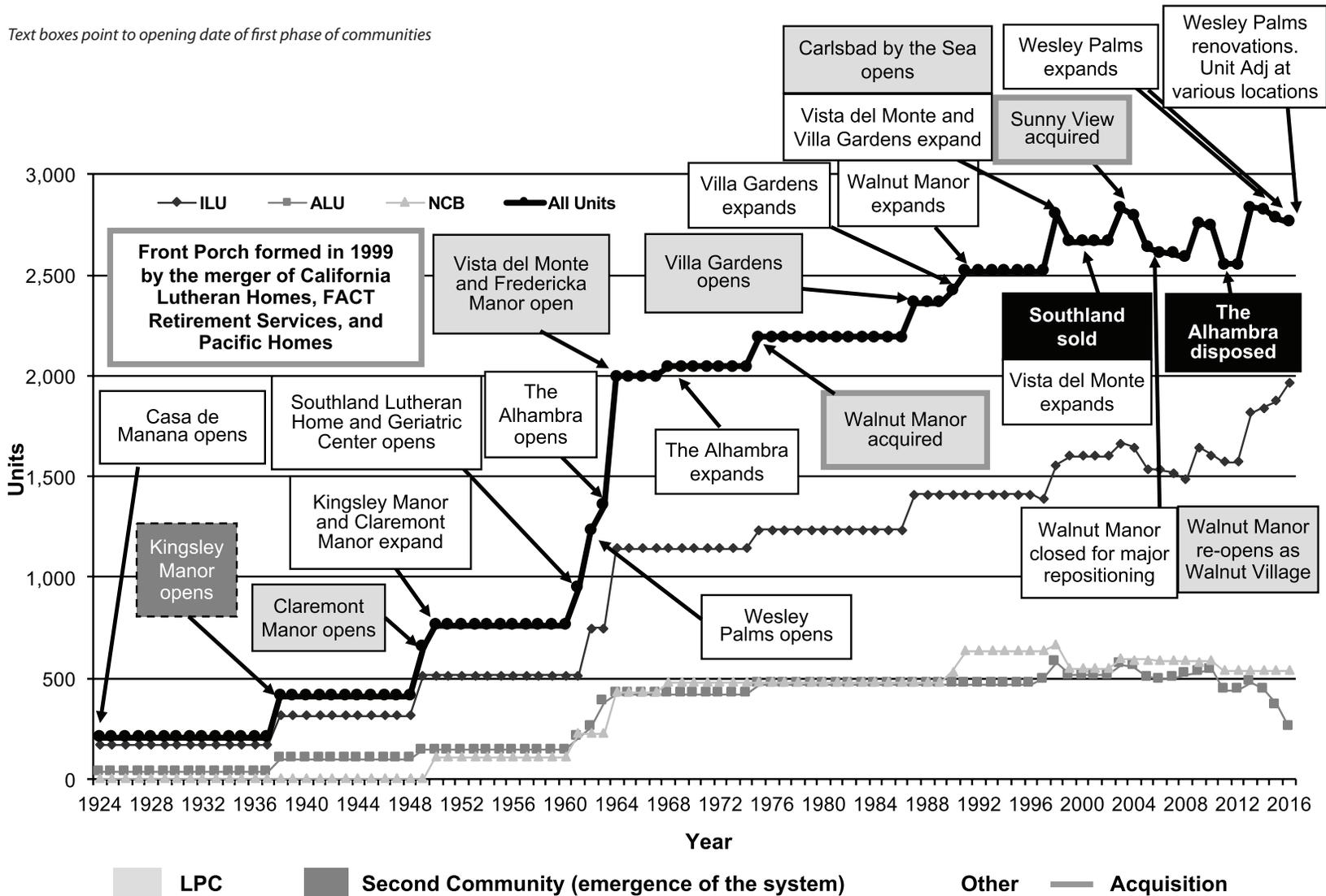


LeadingAge 150 Ziegler

5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2o FRONT PORCH COMMUNITIES AND SERVICES (CA)

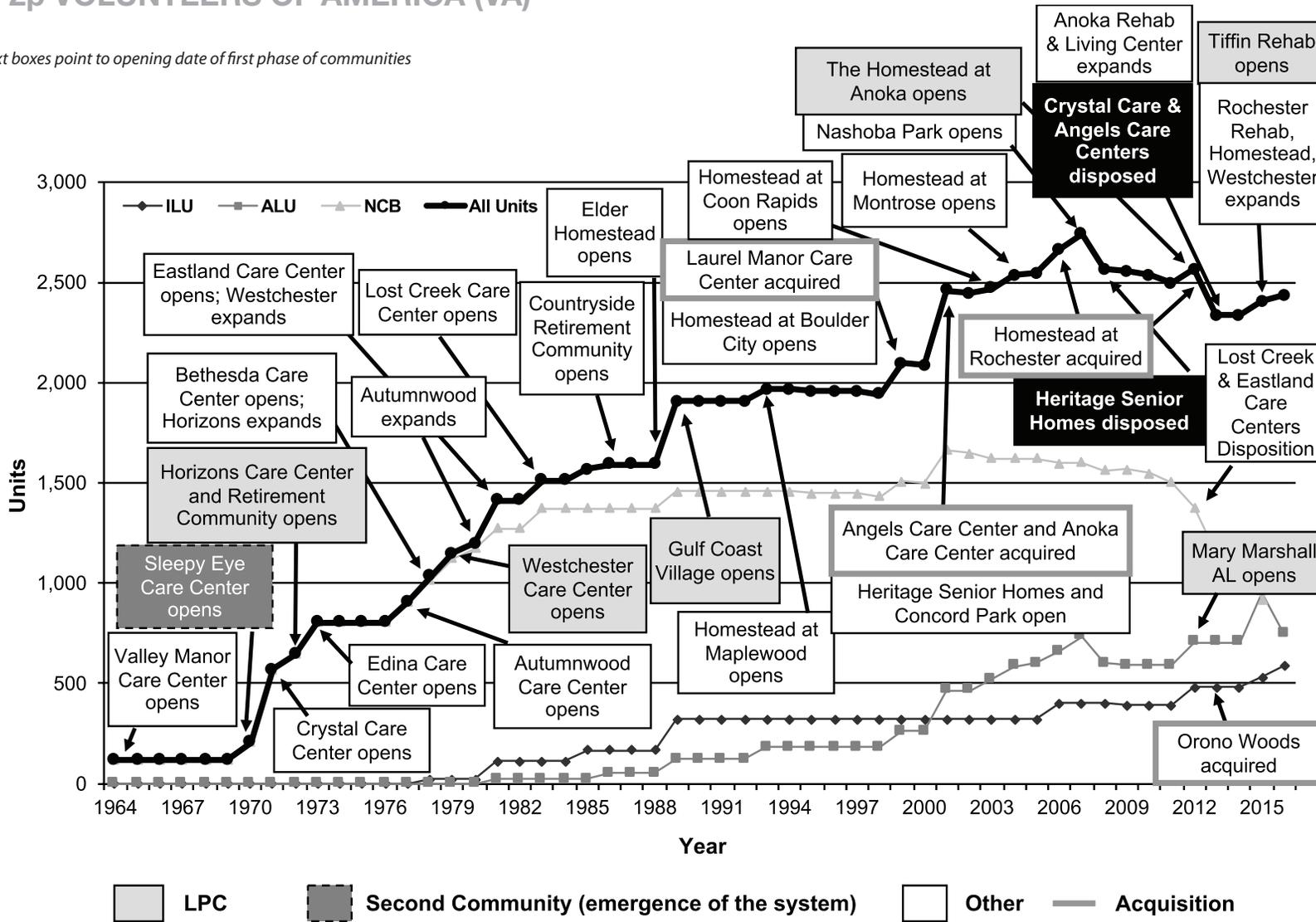


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2p VOLUNTEERS OF AMERICA (VA)

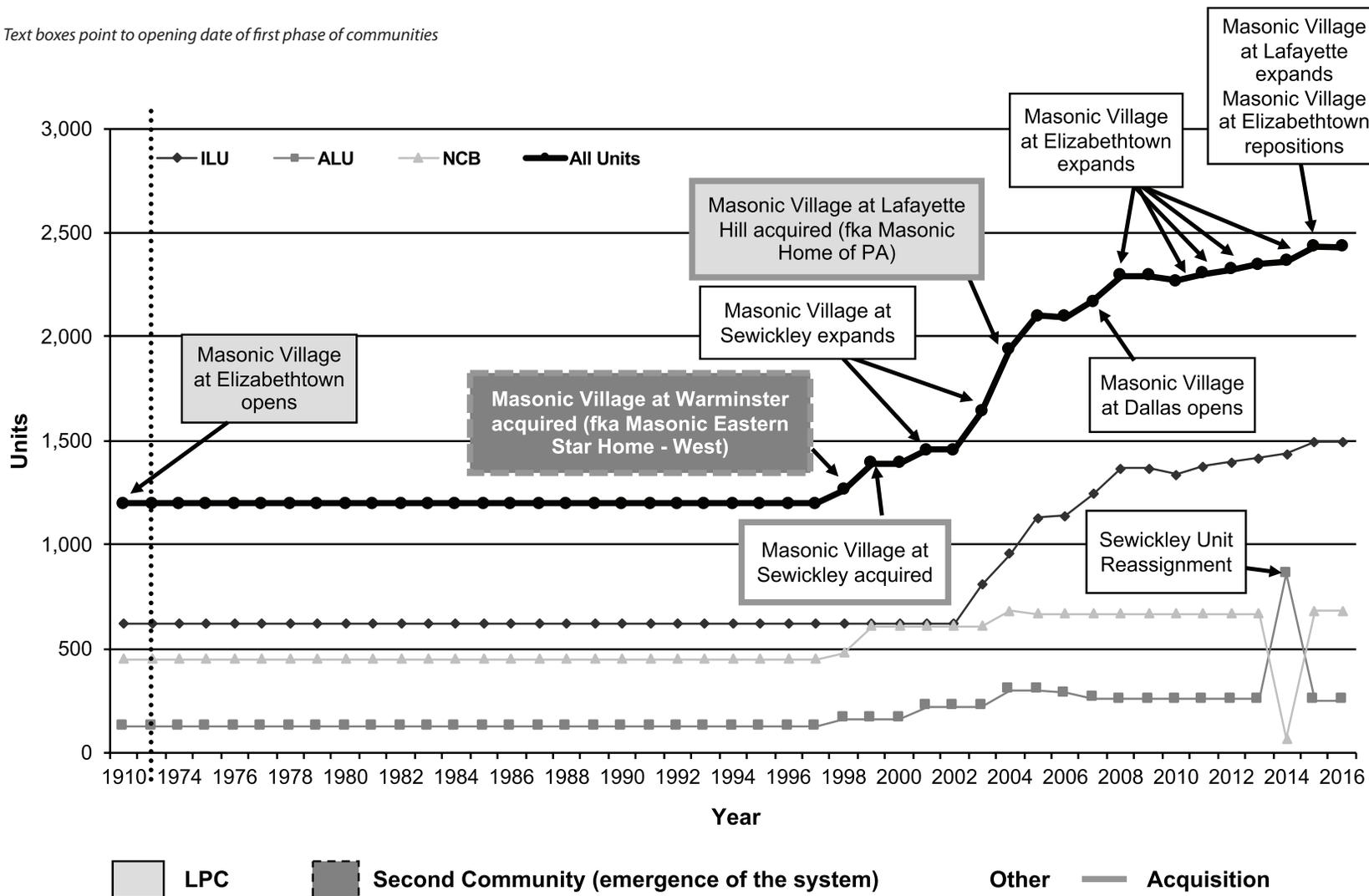
Text boxes point to opening date of first phase of communities



5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth 5-2q MASONIC VILLAGES (PA)

Text boxes point to opening date of first phase of communities

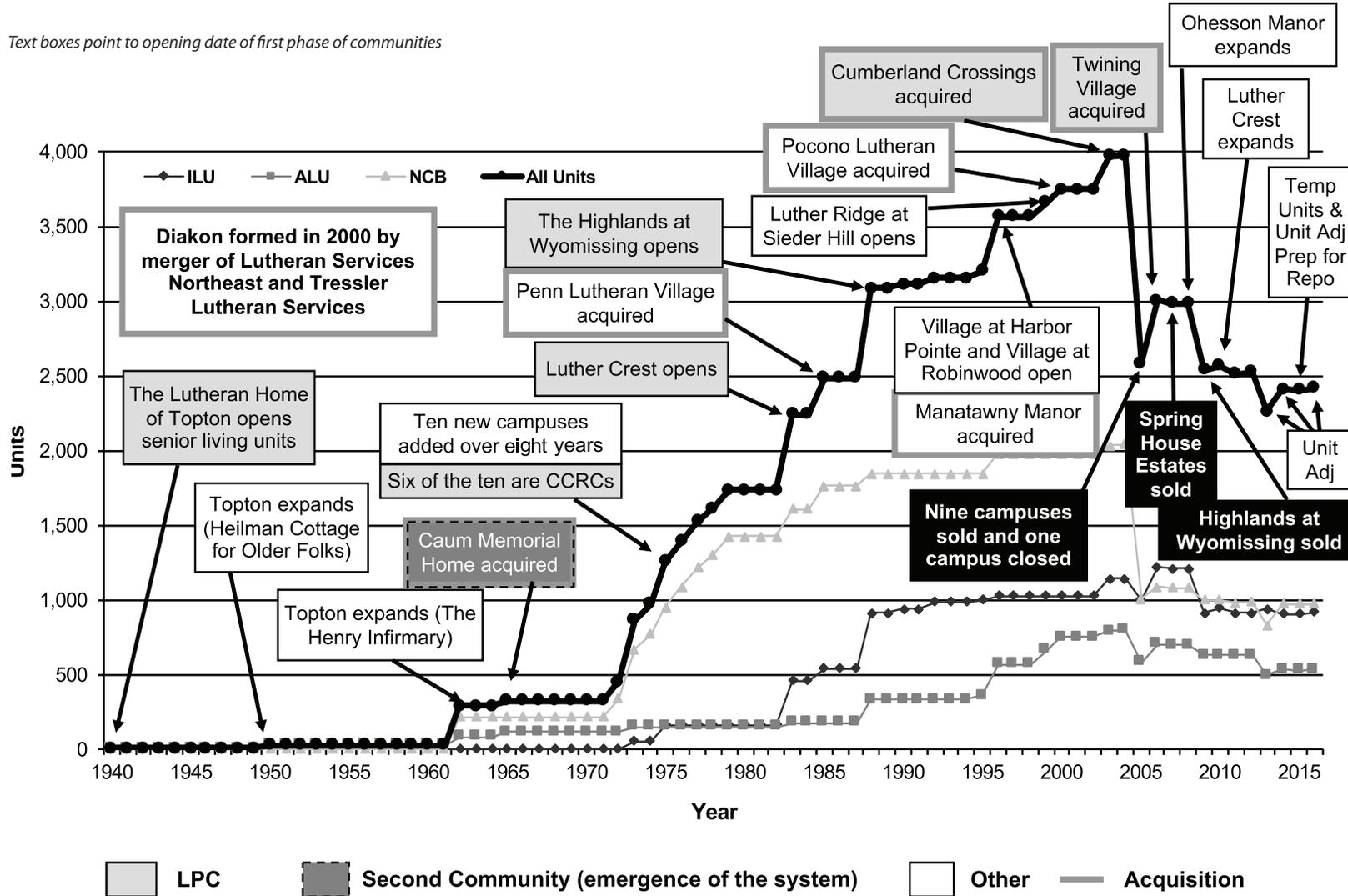


5-2 2017 LeadingAge Ziegler 150

Growth: Pace of Growth

5-2r DIAKON LUTHERAN SOCIAL MINISTRIES (PA)

Text boxes point to opening date of first phase of communities



5-3 2017 LeadingAge Ziegler 150

Growth: Aggregate Growth

5-3a ORGANIZATIONS BY AGGREGATE GROWTH, BY PERIOD

2017 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/16)
			Aggregate Growth (%)	Average Annual Growth (%)		
<i>Growth in 2016 (n=150)</i>						
48	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	57.59%	135.78%	907	1,575
7	HumanGood fka Cornerstone (ABHOW & be.group)	CA	30.31%	43.49%	1,443	4,761
86	Saint Therese	MN	26.22%	35.53%	248	946
15	Asbury Communities	MD	15.66%	18.57%	541	3,455
27	Springpoint Senior Living	NJ	13.69%	15.86%	312	2,279
<i>Growth from 2000 to 2016 (n=150)</i>						
1	National Senior Campuses	MD	626.03%	17.96%	16,427	19,051
62	SantaFe Senior Living	FL	342.71%	13.20%	1,011	1,076
37	National Church Residences	OH	321.77%	12.48%	1,419	1,419
50	Loretto	NY	296.30%	12.16%	1,120	1,326
25	Ecumen	MN	261.48%	11.15%	1,731	1,731
13	Lutheran Senior Services	MO	213.77%	10.56%	2,266	2,635
31	Christian Care Companies	AZ	206.49%	10.84%	1,241	1,517
<i>Growth from 1990 to 2016 (n=125)</i>						
102	Givens Estates Retirement Community	NC	789.13%	10.58%	726	818
50	Loretto	NY	770.93%	10.34%	1,326	1,498
4	Presbyterian Homes and Services	MN	765.77%	10.36%	6,241	7,056
82	Elant	NY	729.17%	10.09%	875	995
75	Lutheran Homes of South Carolina	SC	700.75%	9.92%	939	1,073
20	Pacific Retirement Services, Inc.	OR	524.95%	8.69%	2,399	2,856
62	SantaFe Senior Living	FL	467.83%	8.21%	1,076	1,306
31	Christian Care Companies	AZ	466.77%	8.77%	1,517	1,842
76	Eventide	MN	440.51%	8.03%	859	1,054

* 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 cannot be calculated in these instances.

5-3 2017 LeadingAge Ziegler 150

Growth: Aggregate Growth

5-3b ORGANIZATIONS BY GROWTH IN UNITS, BY PERIOD

2017 Rank	System Name	State	Growth*		Total Units (as of 12/31/16)
			Units Added	Aggregate Growth (%)	
<i>Growth in 2016 (n=150)</i>					
15	HumanGood fka Cornerstone (ABHOW & be.group)	CA	1,443	30.31%	4,761
48	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	907	57.59%	1,575
15	Asbury Communities	MD	541	15.66%	3,455
1	National Senior Campuses	MD	524	2.75%	19,051
27	Springpoint Senior Living	NJ	312	13.69%	2,279
86	Saint Therese	MN	248	26.22%	946
31	Christian Care Companies	AZ	225	10.89%	2,067
13	Lutheran Senior Services	MO	209	5.91%	3,535
<i>Growth from 2000 to 2016 (n=150)</i>					
1	National Senior Campuses	MD	16,427	626.03%	19,051
2	The Evangelical Lutheran Good Samaritan Society	SD	7,015	64.91%	17,839
4	Presbyterian Homes and Services	MN	4,375	163.19%	7,135
13	Lutheran Senior Services	MO	2,266	213.77%	3,535
3	Acts Retirement-Life Communities	PA	2,184	37.99%	7,862
12	The Kendal Corporation	PA	1,983	113.77%	3,758
36	Senior Quality Lifestyle Corporation	TX	1,858	n/a**	1,858
<i>Growth from 1990 to 2016 (n=125)</i>					
1	National Senior Campuses	MD	19,051	n/a**	19,051
2	The Evangelical Lutheran Good Samaritan Society	SD	8,037	82.14%	17,839
4	Presbyterian Homes and Services	MN	6,241	765.77%	7,135
3	Acts Retirement-Life Communities	PA	3,002	60.88%	7,862
12	The Kendal Corporation	PA	2,973	394.82%	3,758
13	Lutheran Senior Services	MO	2,635	381.33%	3,535
20	Pacific Retirement Services	OR	2,399	524.95%	2,856
17	Westminster Communities of Florida	FL	2,070	174.83%	3,270
15	Asbury Communities	MD	2,039	233.03%	3,455
14	Presbyterian Senior Living	PA	2,026	143.89%	3,527

* 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 cannot be calculated in these instances.

5-3 2017 LeadingAge Ziegler 150

Growth: Aggregate Growth

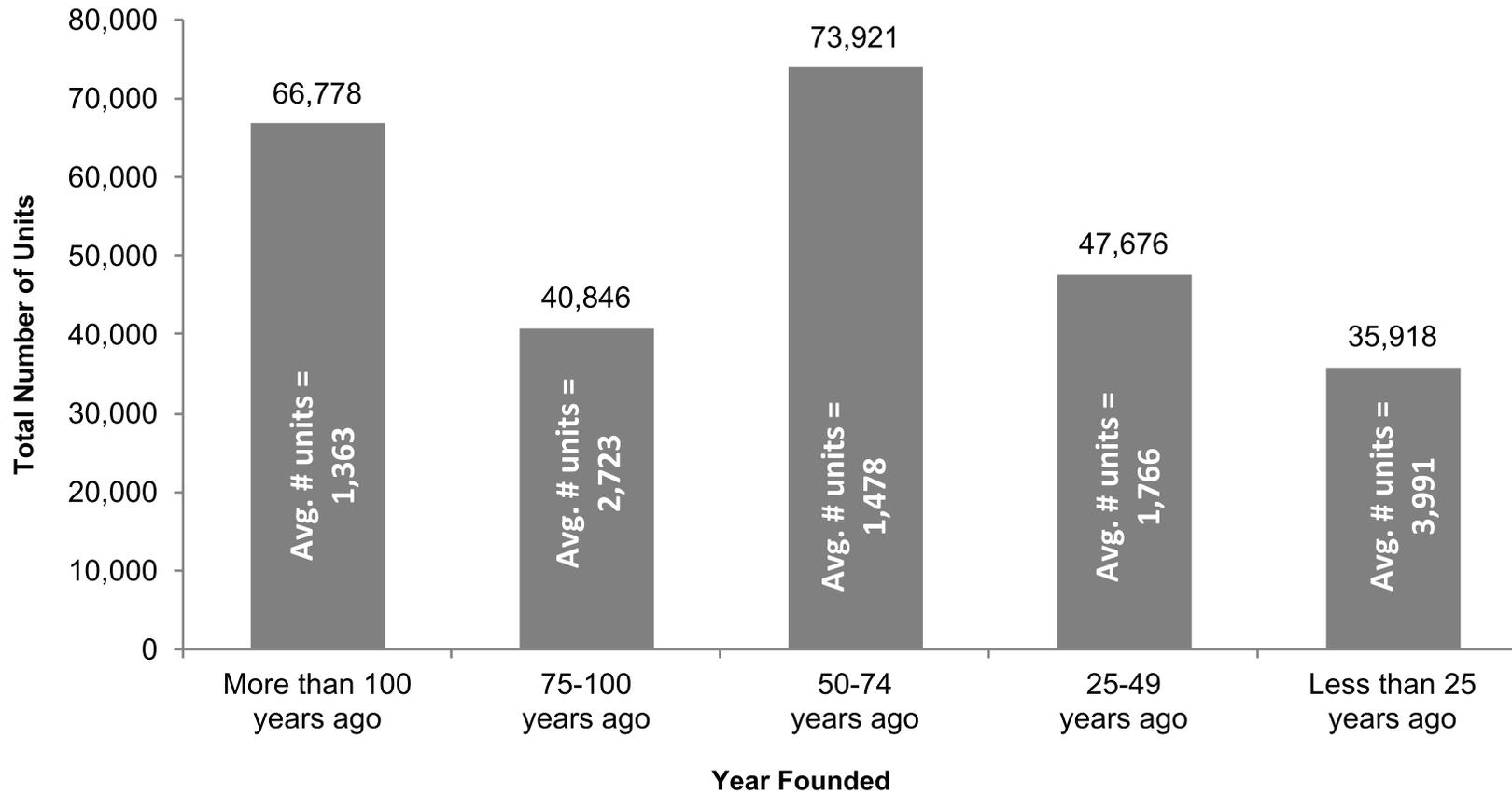
5-3c ORGANIZATIONS BY AGGREGATE GROWTH FOR THE LARGEST SYSTEMS (MORE THAN 2000 UNITS)

2017 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/16)
			Aggregate Growth (%)	Average Annual Growth (%)		
<i>Growth in 2016 (n=33)</i>						
7	HumanGood fka Cornerstone (ABHOW & be.group)	CA	30.31%	43.49%	1,443	4,761
15	Asbury Communities	MD	15.66%	18.57%	541	3,455
27	Springpoint Senior Living	NJ	13.69%	15.86%	312	2,279
31	Christian Care Companies	AZ	10.89%	12.21%	225	2,067
30	Augustana Care Corporation	MN	7.66%	8.29%	161	2,102
13	Lutheran Senior Services	MO	5.91%	6.28%	209	3,535
32	Otterbein Senior Lifestyle Choices	OH	5.79%	6.15%	118	2,037
28	Christian Homes, Inc.	MO	3.53%	3.66%	77	2,181
1	National Senior Campuses	MD	2.75%	2.83%	524	19,051
14	Presbyterian Senior Living	PA	2.64%	2.71%	93	3,527
<i>Growth from 2000 to 2016 (n=33)</i>						
1	National Senior Campuses	MD	626.03%	17.96%	524	18,527
25	Ecumen	MN	261.48%	11.15%	-39	2,393
13	Lutheran Senior Services	MO	213.77%	10.56%	209	3,326
31	Christian Care Companies	AZ	206.49%	10.84%	225	2,067
4	Presbyterian Homes and Services	MN	163.19%	8.50%	79	7,056
20	Pacific Retirement Services, Inc.	OR	120.20%	6.80%	0	2,856
12	The Kendal Corporation	PA	113.77%	6.61%	32	3,726
30	Augustana Care Corporation	MN	91.23%	6.25%	161	2,102
15	Asbury Communities	MD	77.90%	6.42%	541	2,914
23	Masonic Villages	PA	74.98%	4.77%	-1	2,434
2	The Evangelical Lutheran Good Samaritan Society	SD	64.91%	4.27%	17	17,822
14	Presbyterian Senior Living	PA	60.39%	4.25%	93	2,085
<i>Growth from 1990 to 2015 (n=19)</i>						
4	Presbyterian Homes and Services	MN	765.77%	10.31%	79	7,135
20	Pacific Retirement Services, Inc.	OR	524.95%	8.69%	0	2,856
31	Christian Care Companies	AZ	466.77%	8.77%	225	2,067
12	The Kendal Corporation	PA	394.82%	7.58%	32	3,758
13	Lutheran Senior Services	MO	381.33%	7.70%	209	3,535
25	Ecumen	MN	261.48%	5.94%	-39	2,354
15	Asbury Communities	MD	233.03%	6.44%	541	3,455
17	Westminster Communities of Florida	FL	174.83%	4.73%	16	3,270
30	Augustana Care Corporation	MN	168.09%	4.96%	161	2,102
14	Presbyterian Senior Living	PA	143.89%	4.26%	93	3,527
32	Otterbein Senior Lifestyle Choices	OH	135.17%	4.25%	118	2,037
19	Ohio Living fka Ohio Presbyterian Retirement Services	OH	126.03%	3.63%	-98	3,080
23	Masonic Villages	PA	102.66%	3.26%	-1	2,433

5-4 2017 LeadingAge Ziegler 150

Growth: Size By Year Founded

5-4 TOTAL UNITS BY YEAR FOUNDED AMONG LZ 150



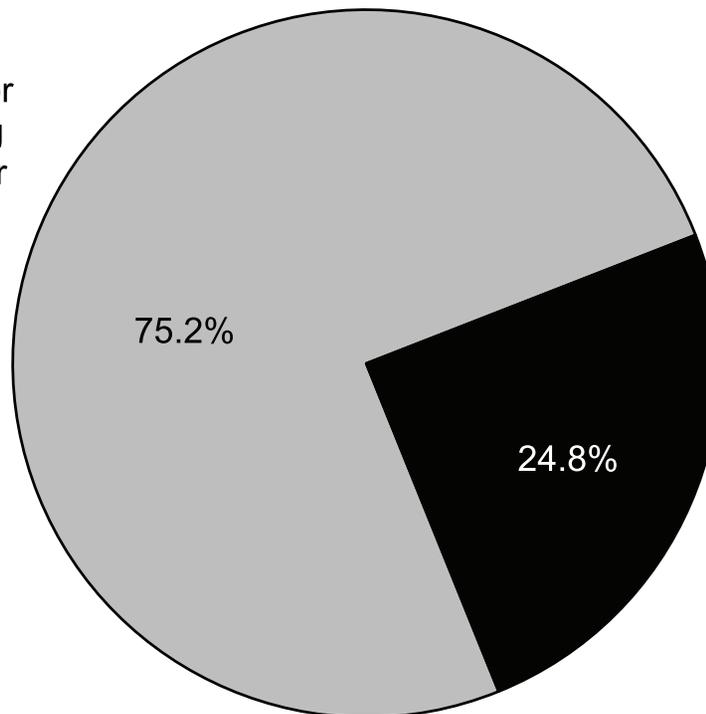
LeadingAge
150
Ziegler

5-5 2017 LeadingAge Ziegler 150

Growth: Future Growth Plans

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

Yes, plan to expand or reposition an existing community in 2017 or 2018

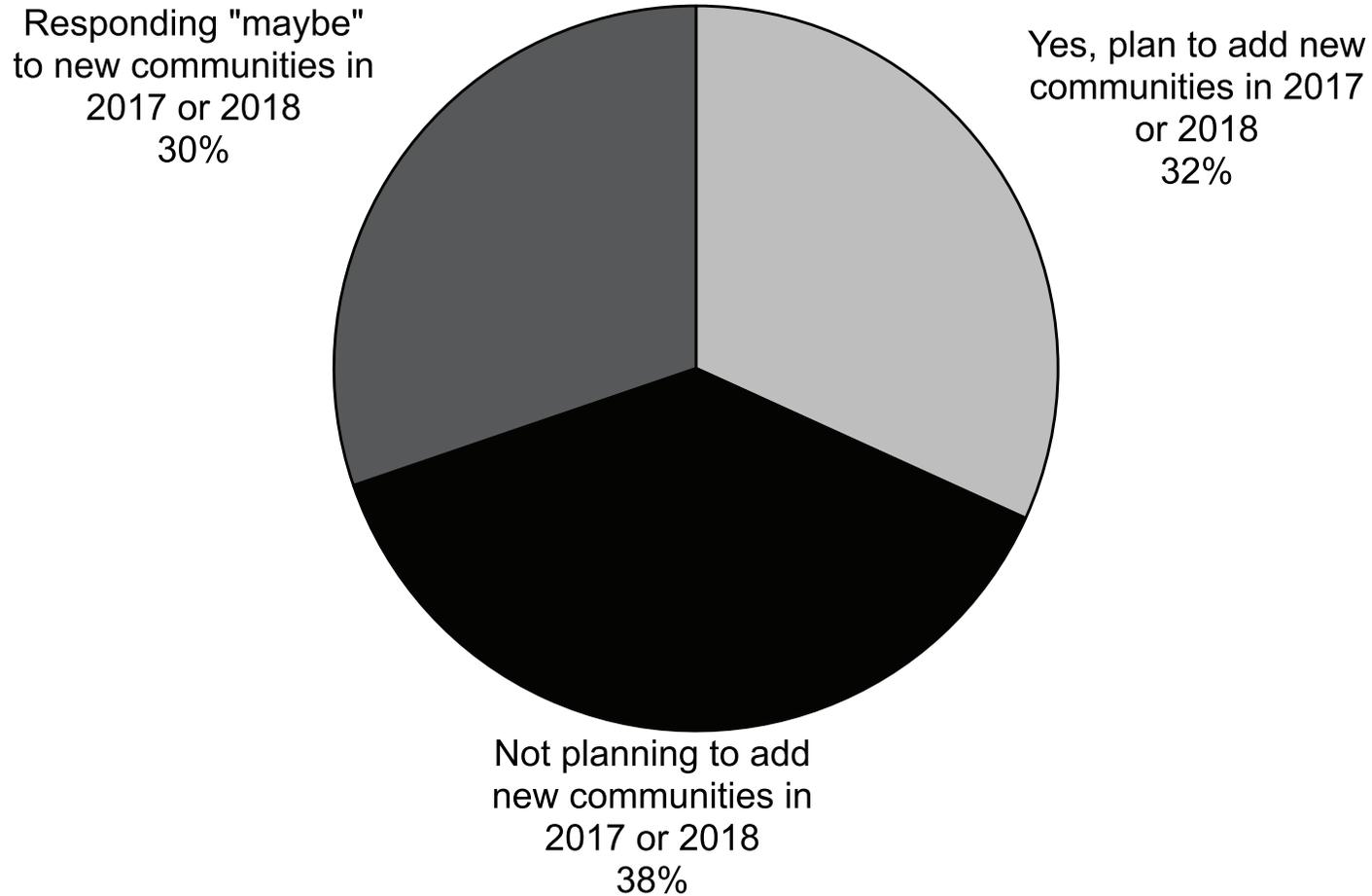


Not planning to expand or reposition in 2017 or 2018

5-5 2017 LeadingAge Ziegler 150

Growth: Future Growth Plans

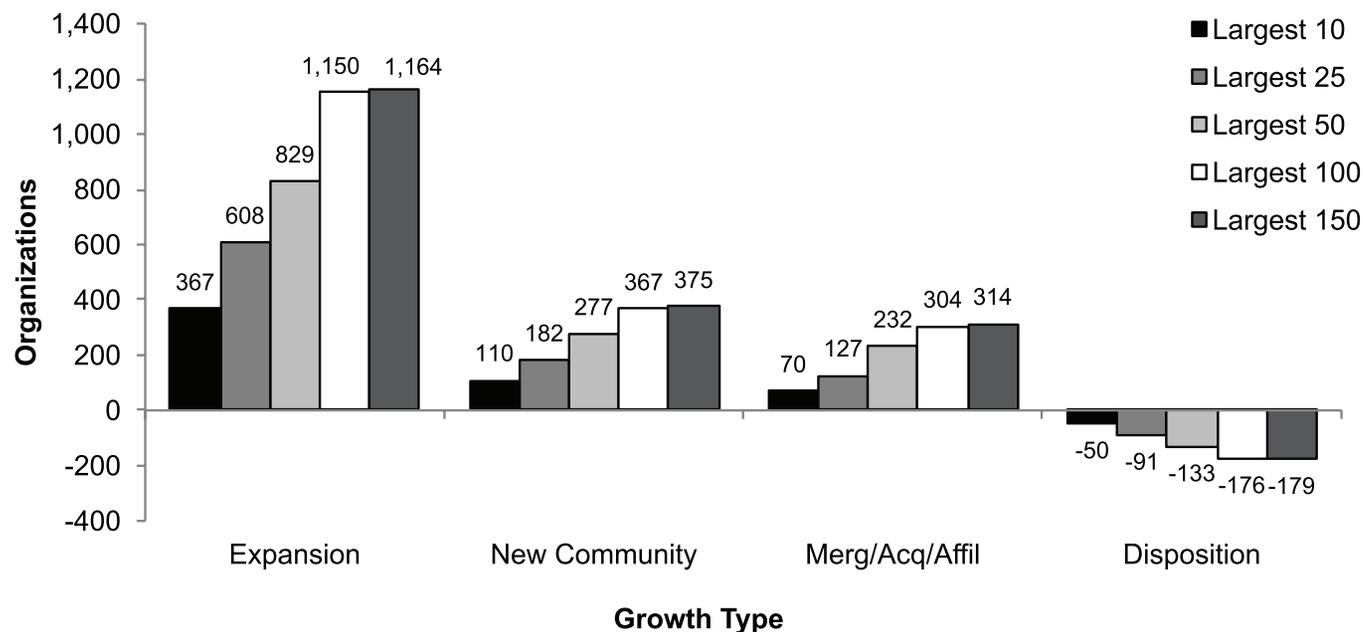
5-5b PERCENTAGE OF LZ 150 PLANNING TO GROW THROUGH DEVELOPMENT OR AFFILIATION



5-6 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Organizations

5-6a NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1980 THROUGH 2016



Note: Expansion to LZ 150 begins with data in year 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.

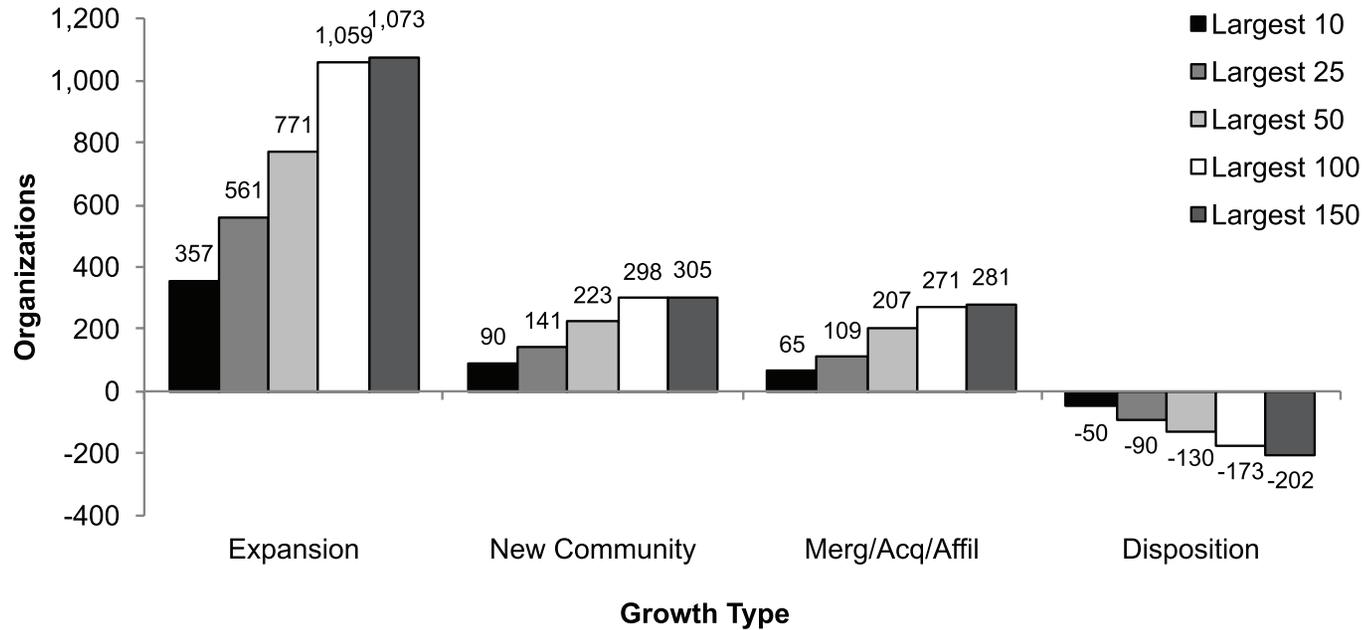
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-6 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Organizations

5-6b NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1990 THROUGH 2016



Note: Expansion to LZ 150 begins with data in year 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.

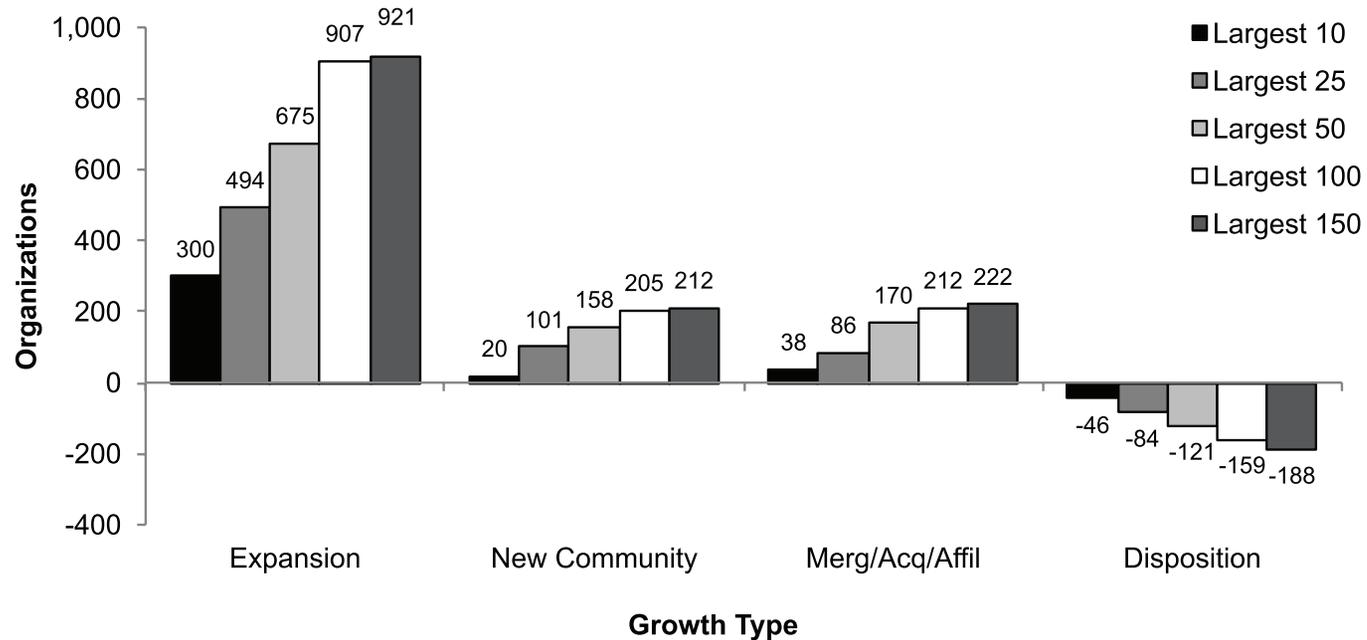
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-6 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Organizations

5-6c NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 2000 THROUGH 2016



Note: Expansion to LZ 150 begins with data in year 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.

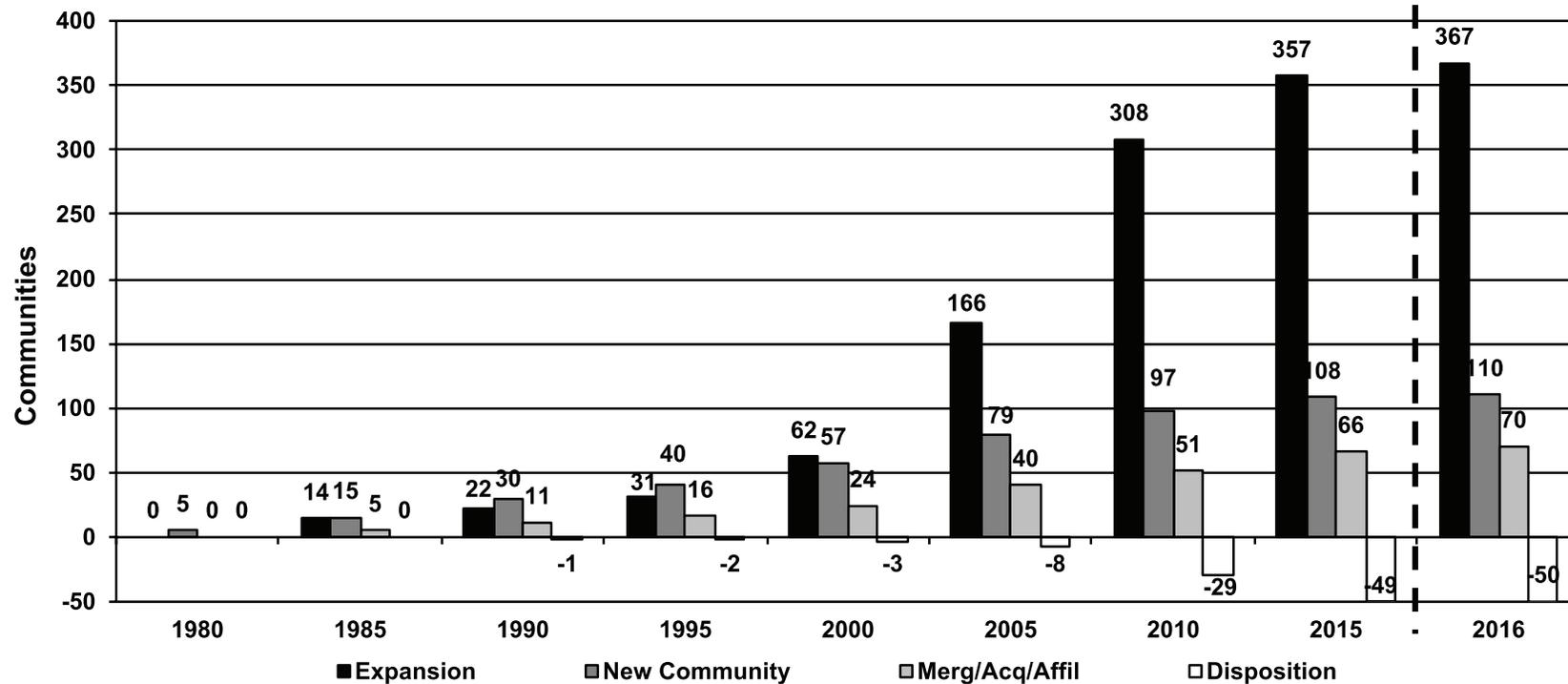
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-7 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Communities 5-7a 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.

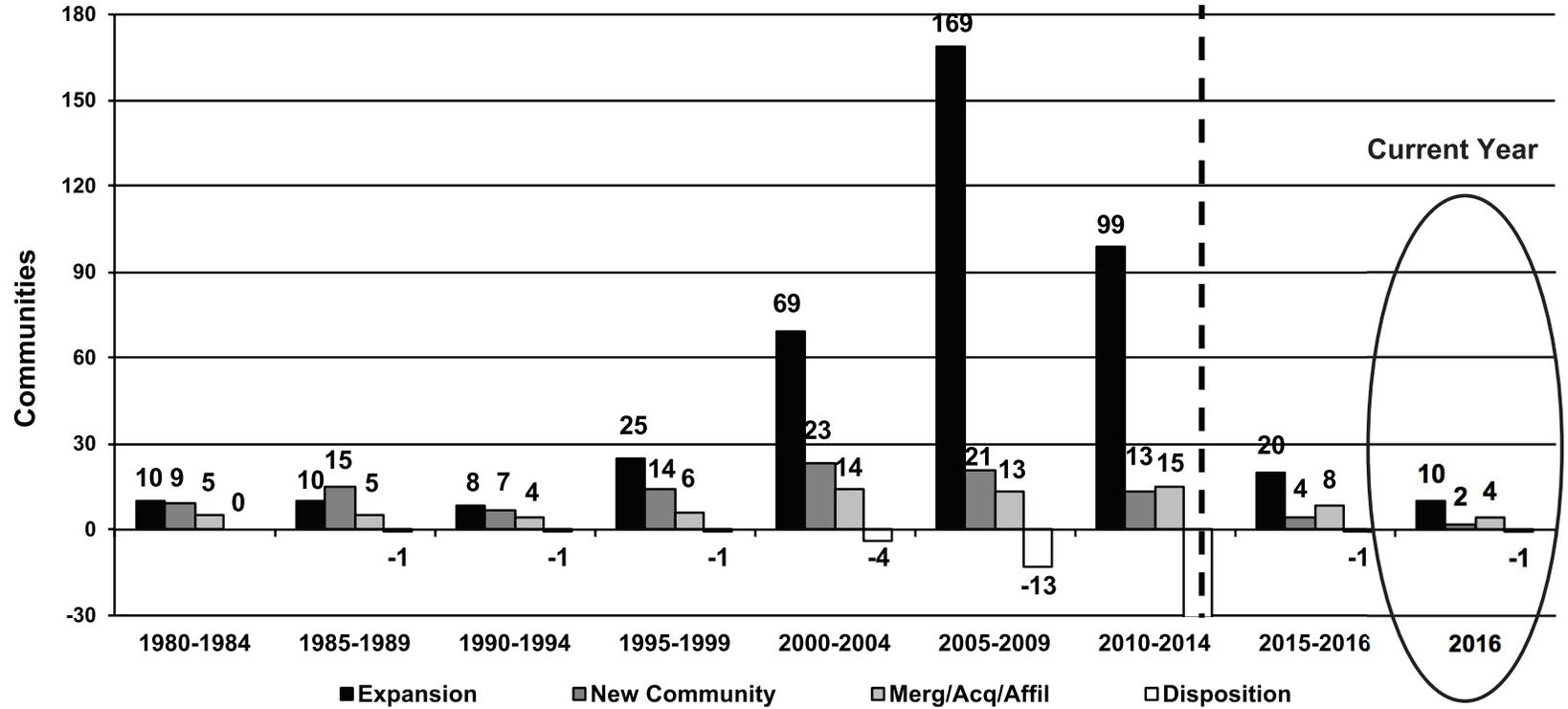


5-7 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Communities

5-7b INCREMENTAL 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.

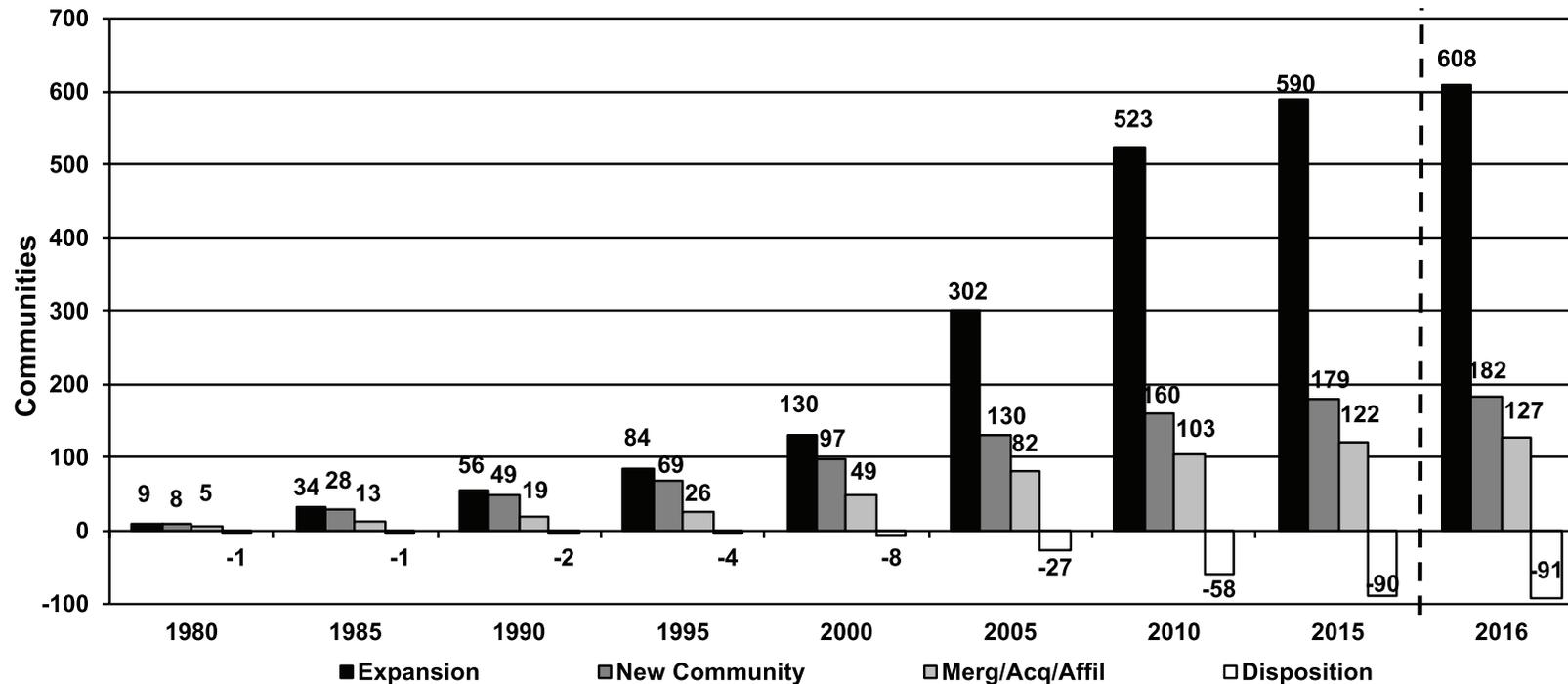
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-7 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Communities 5-7c 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.

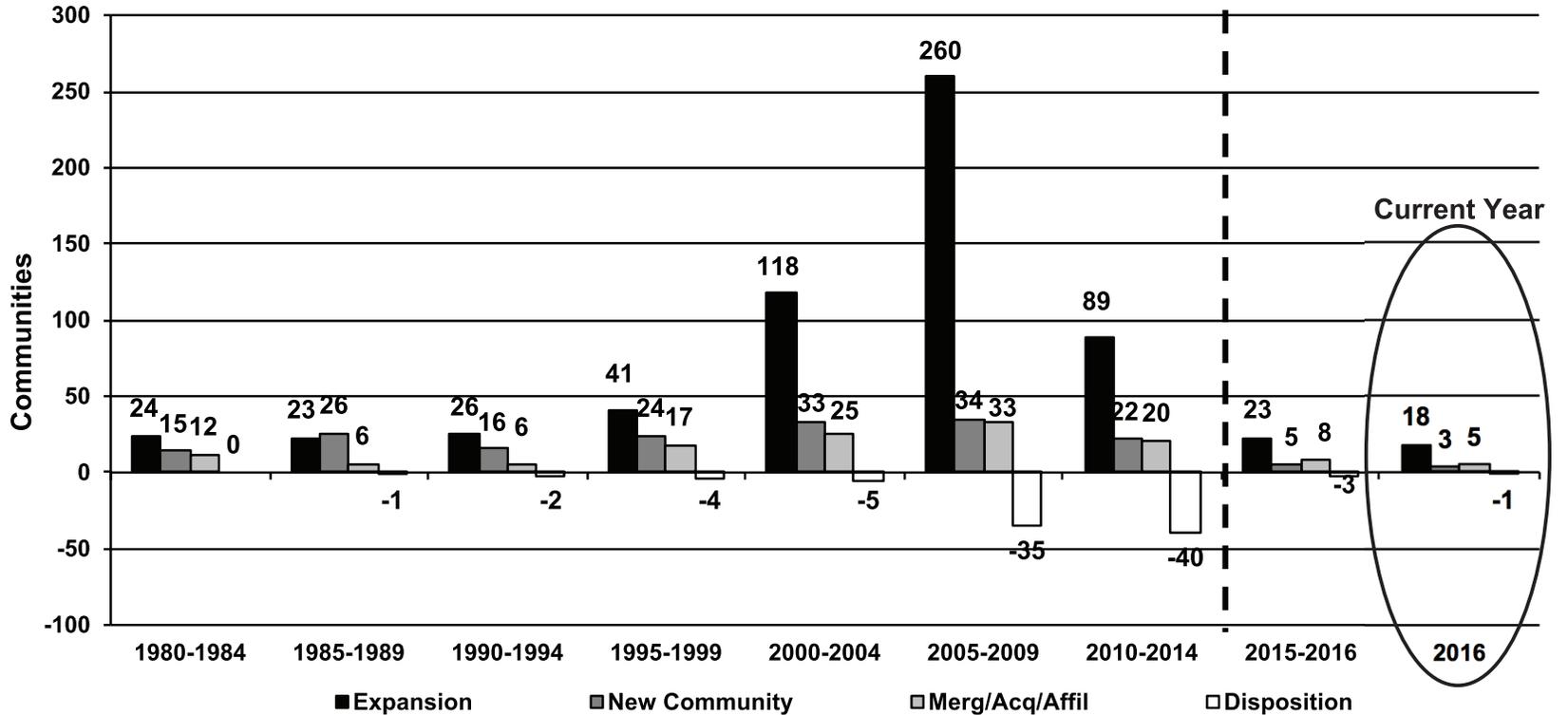
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-7 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Communities

5-7d 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.

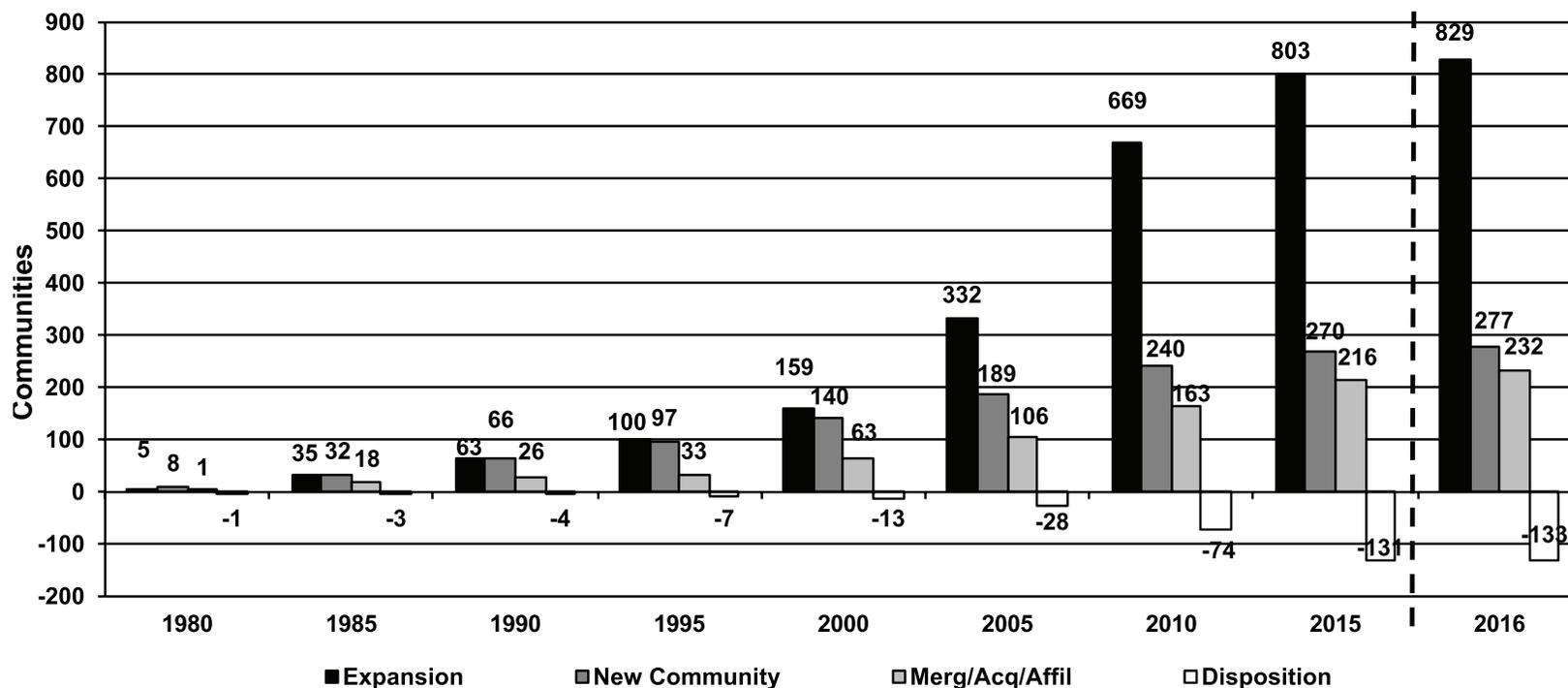
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-7 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Communities 5-7e 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.

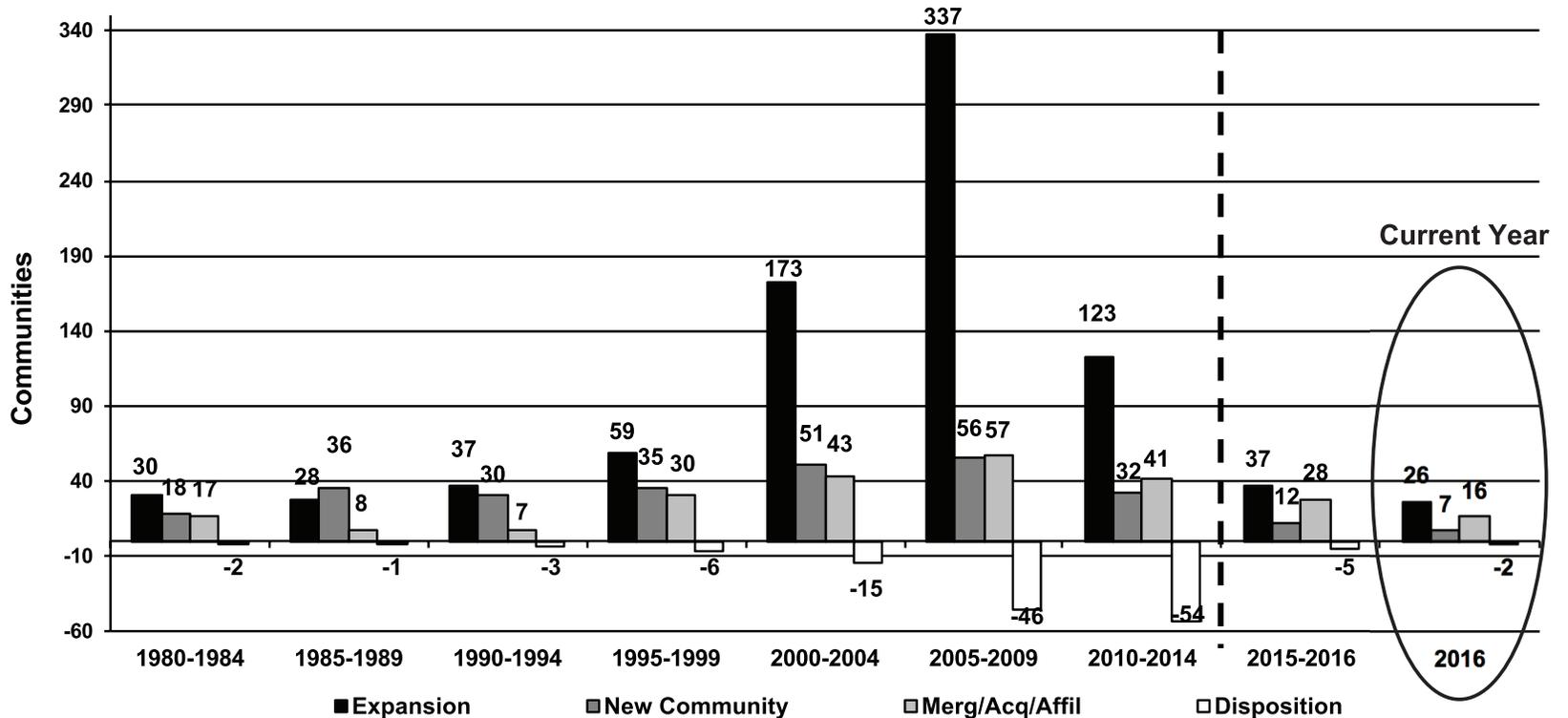
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-7 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Communities

5-7f 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.

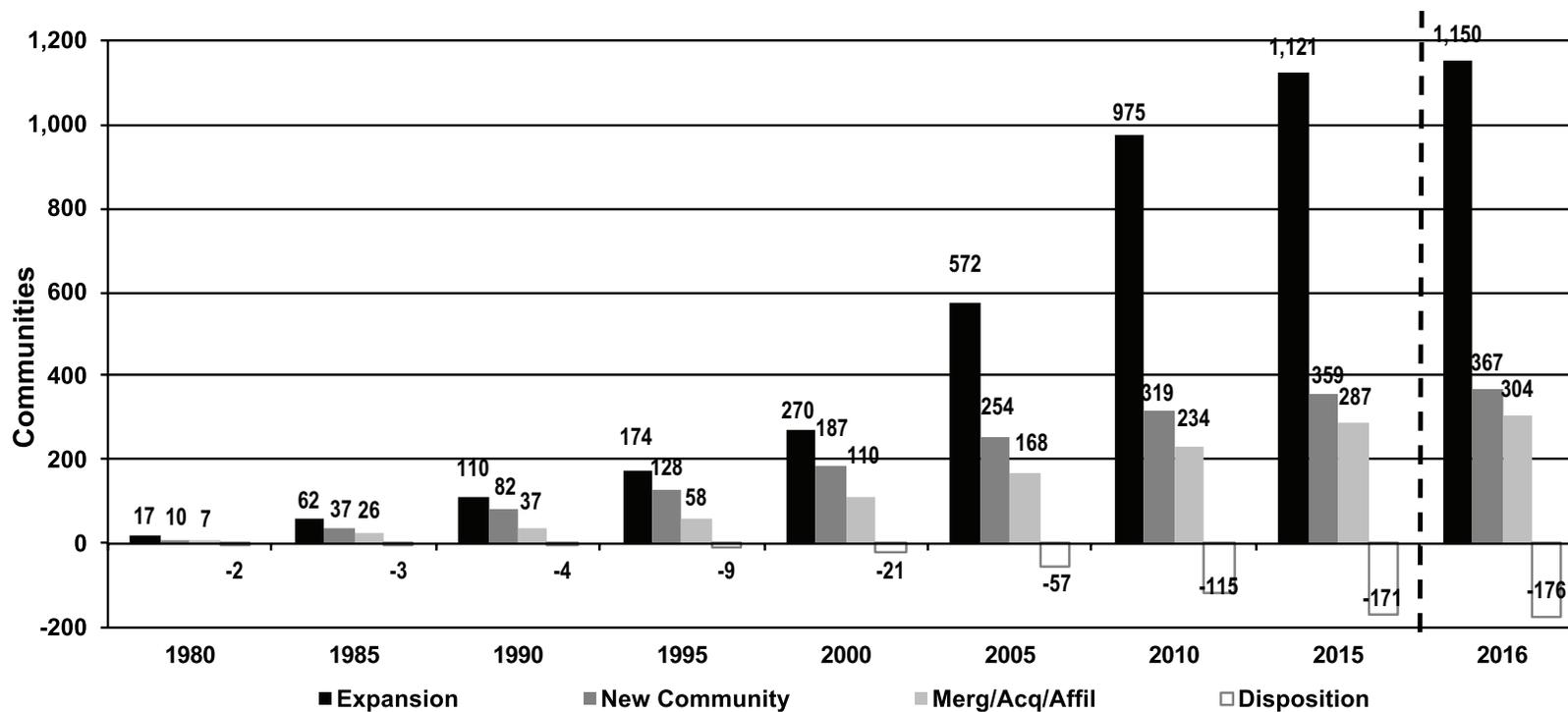
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-7 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Communities 5-7g 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.

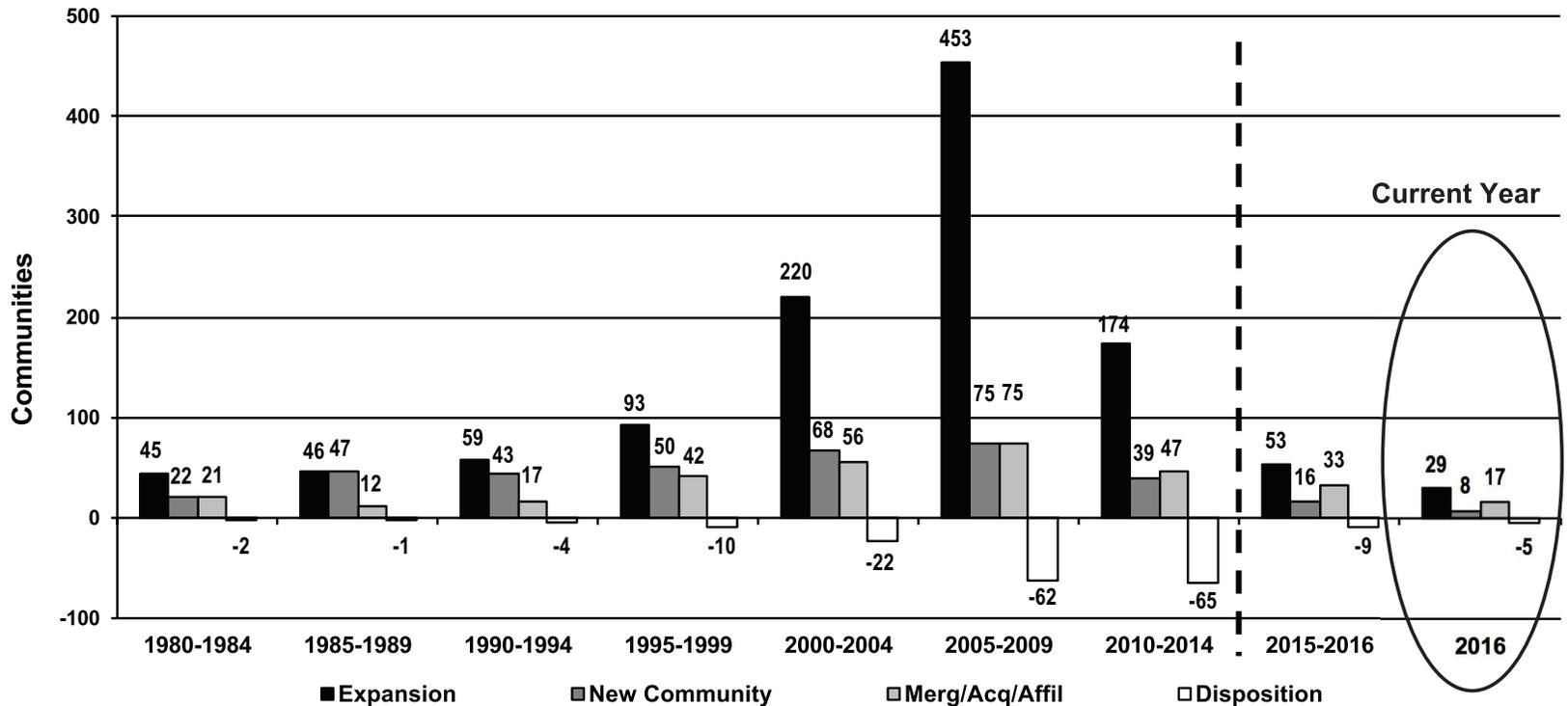
Disposition: The sale or closure of a community.

5-7 2017 LeadingAge Ziegler 150

Growth: Type of Growth by Communities

5-7h INCREMENTAL 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.

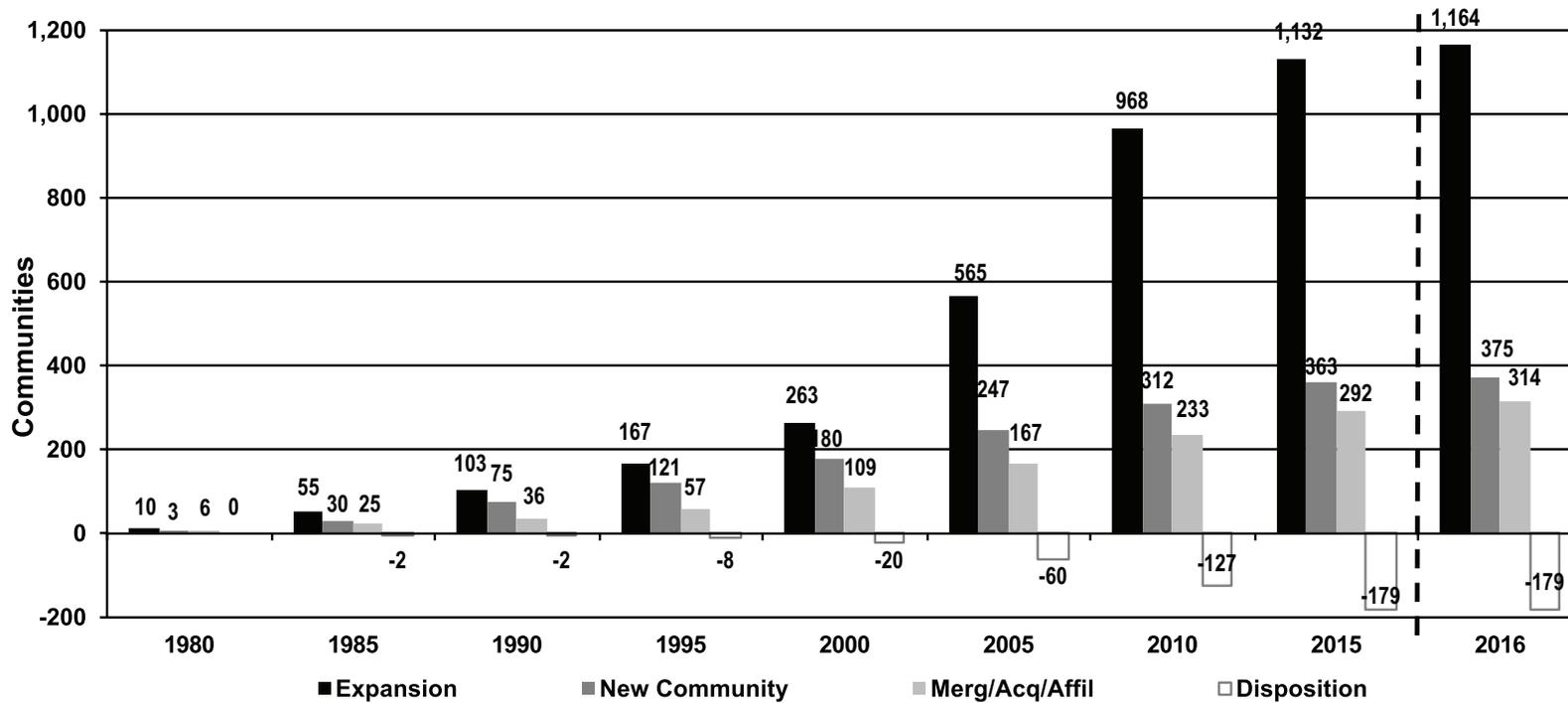
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-7 2017 LeadingAge Ziegler 150

Growth: Type of Growth of Communities 5-7i CUMULATIVE GROWTH OF LARGEST 150 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.

Note: Expansion to largest 150 made in 2015

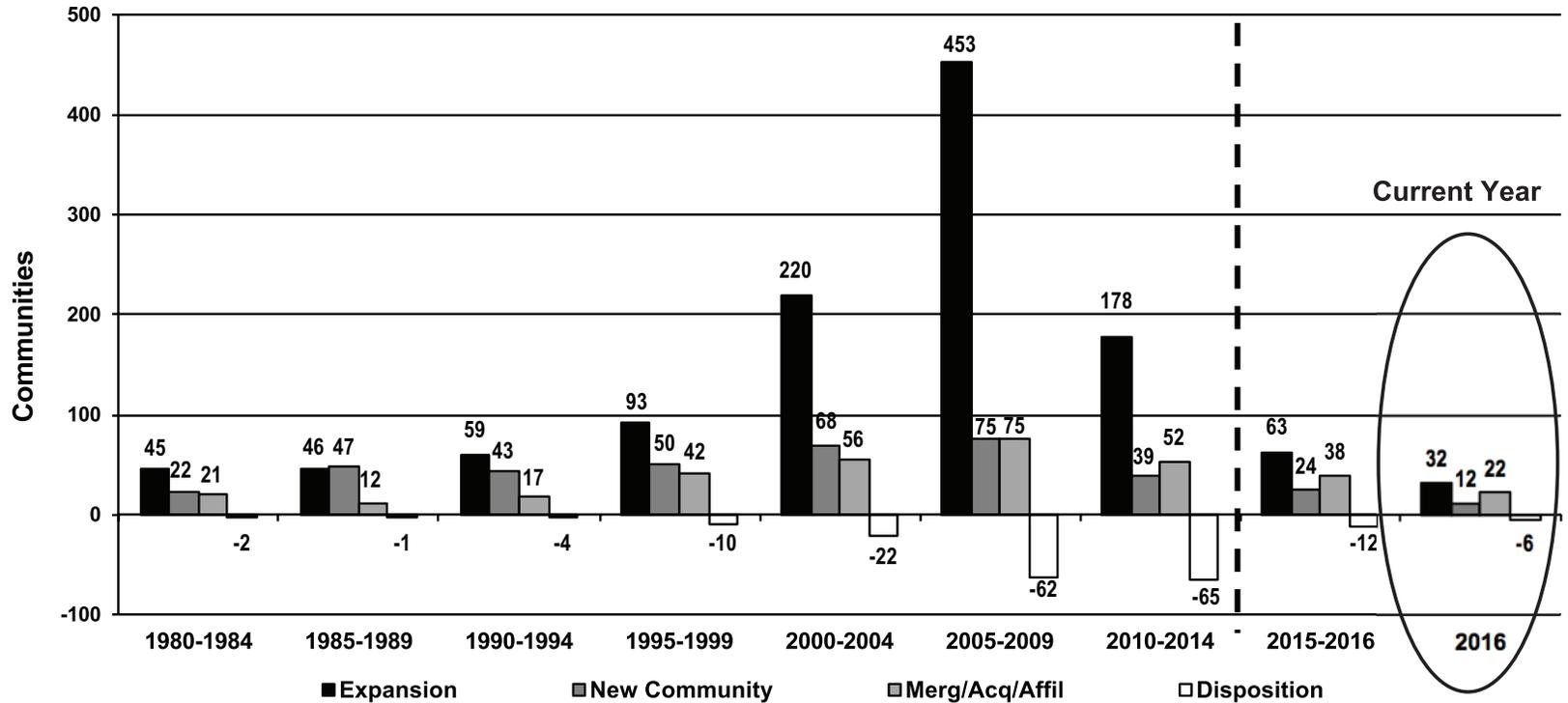
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-7 2017 LeadingAge Ziegler 150

Growth: Type of Growth of Communities

5-7j INCREMENTAL GROWTH OF LARGEST 150 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.

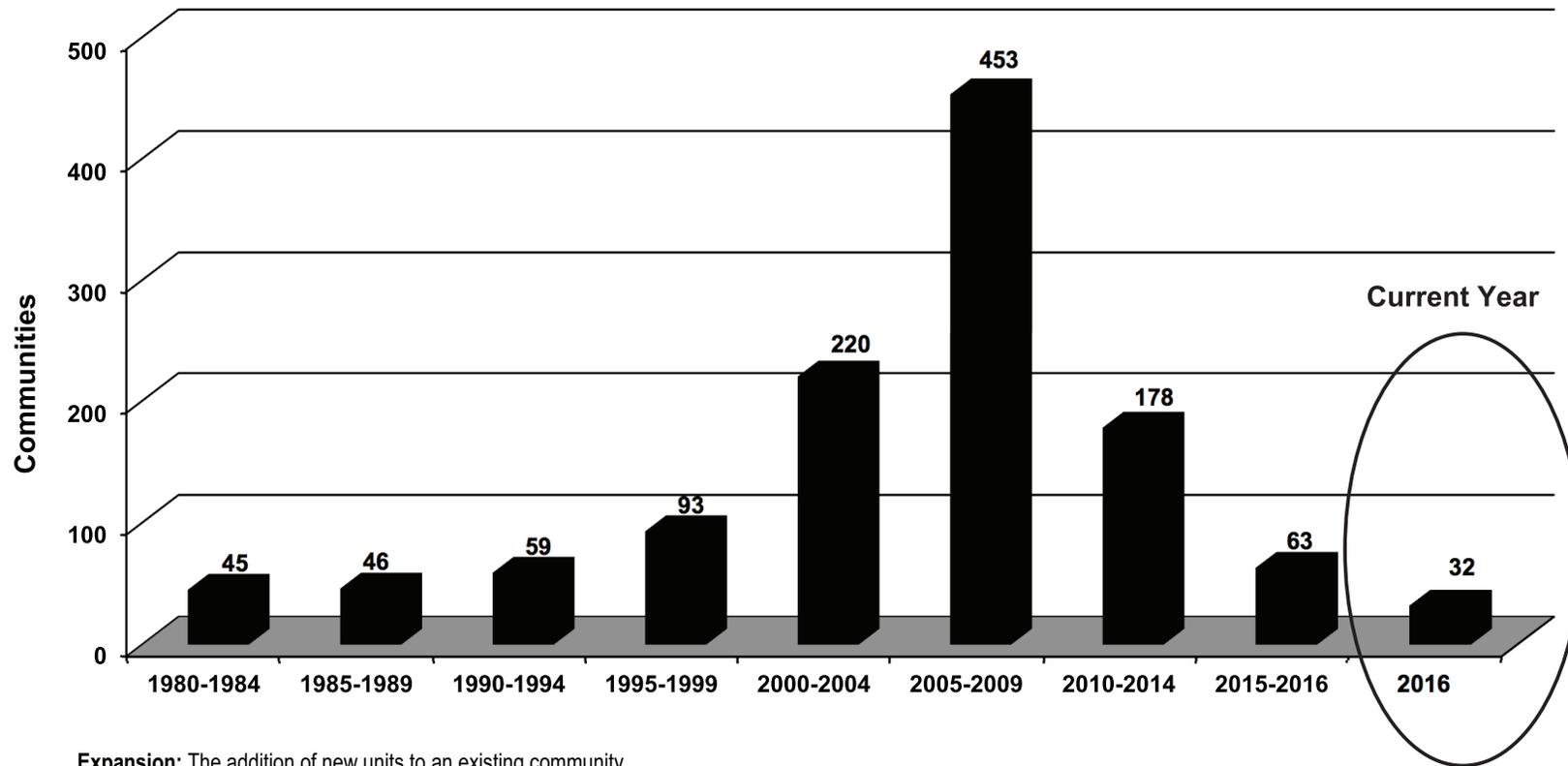
New Community: Growth by the addition of units through construction of a new location.

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.

5-8 2017 LeadingAge Ziegler 150

Growth: Expansions 5-8a 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*

LeadingAge 150 Ziegler

5-8 2017 LeadingAge Ziegler 150

Growth: Expansions

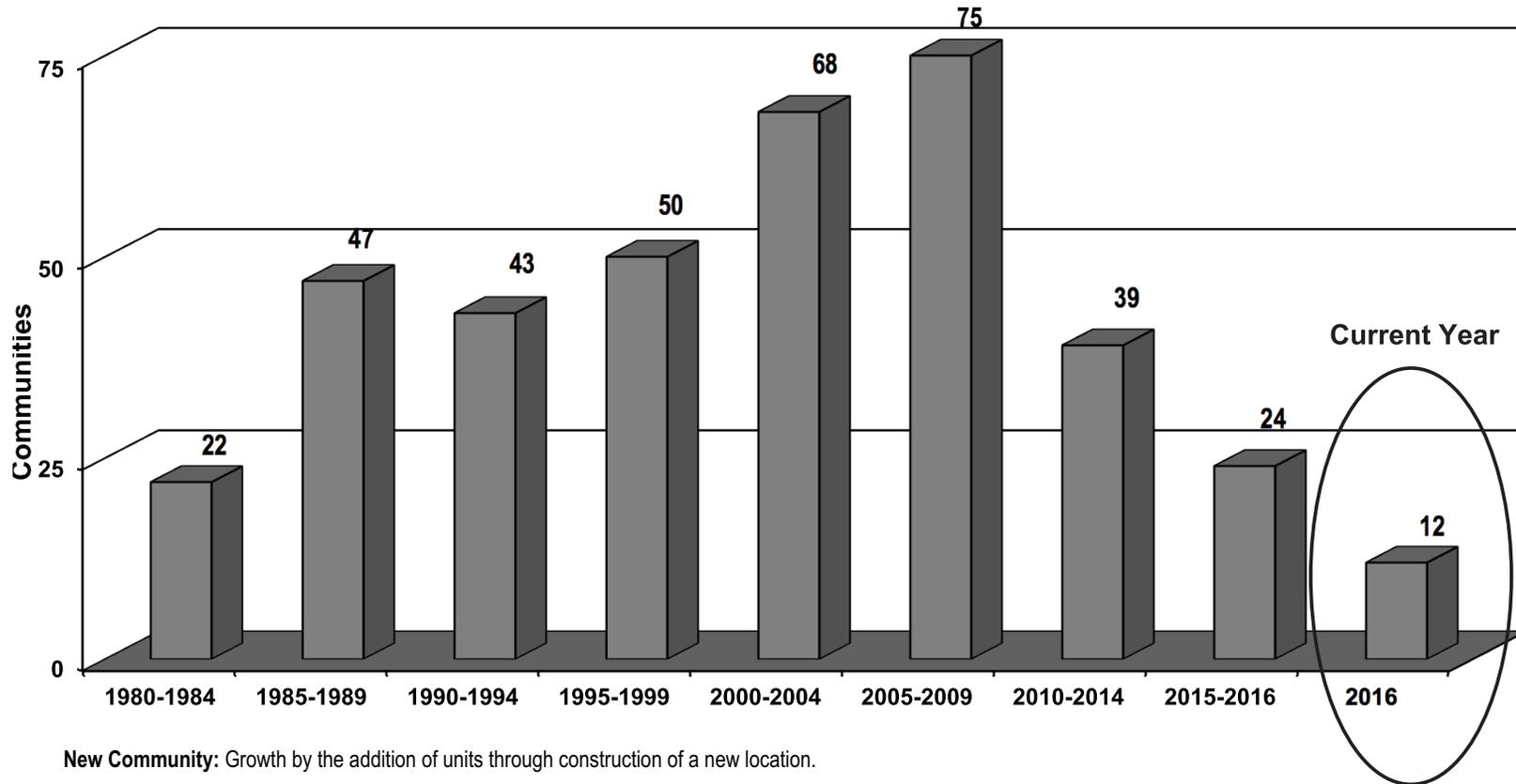
5-8b 2016 COMMUNITY EXPANSIONS

2017 Rank	System Name	Community	City	State	Community Type
1	National Senior Campuses	Eagles Trace	Houston	TX	LPC
1	National Senior Campuses	Fox Run	Novi	MI	LPC
1	National Senior Campuses	Highland Springs	Dallas	TX	LPC
2	The Evangelical Lutheran Good Samaritan Society	Good Samaritan Society-Prescott Village	Prescott	MN	LPC
2	The Evangelical Lutheran Good Samaritan Society	Moscow Good Samaritan Village	Moscow	MN	LPC
2	The Evangelical Lutheran Good Samaritan Society	Fairfield Glade	Fairfield	MN	LPC
2	The Evangelical Lutheran Good Samaritan Society	Good Samaritan Society-Lake Forest Village	Denton	MN	LPC
4	Presbyterian Homes & Services	Marantha	Brooklyn Park	MN	AL
4	Presbyterian Homes & Services	Mill Pond	Ankeny	MN	LPC
7	HumanGood fka Cornerstone (ABHOW & be.group)	Terraces at Los Altos	Los Altos	CA	LPC
11	Lifespace Communities, Inc.	Deerfield	Urbandale	IA	LPC
13	Lutheran Senior Services	Lutheran Hillside Village	Peoria	IL	LPC
13	Lutheran Senior Services	Mason Pointe	St. Louis	MO	AL
14	Presbyterian Senior Living	Kirkland Village	Bethlehem	PA	LPC
14	Presbyterian Senior Living	Quincy Village	Quincy	PA	LPC
17	Westminster Communities of Florida	Westminster Shores	St. Petersburg	FL	LPC
19	Ohio Living fka Ohio Presbyterian Retirement Services	Ohio Living Westminster Thurber	Columbus	OH	IL
22	Volunteers of America	The Homestead at Anoka	Anoka	MN	LPC
29	Shell Point Retirement Community	Shell Point	Fort Myers	FL	LPC
31	Christian Care Companies	Reflections at Fellowship Square Mesa	Mesa	AZ	AL
31	Christian Care Companies	Christian Care Cottonwood Assisted Living	Cottonwood	AZ	AL
32	Otterbein Senior Lifestyle Choices	Otterbein Lebanon	Lebanon	OH	LPC
32	Otterbein Senior Lifestyle Choices	Otterbein Cridersville	Cridersville	OH	LPC
37	National Church Residences	Legacy Village	Xenia	OH	LPC
43	Bethesda Health Group, Inc.	The Oaks at Bethesda	St. Louis	MO	AL
47	Lutheran Life Communities	Lutheran Home	Arlington Heights	IL	NH
60	Phoebe Ministries	Meadowglen at Richland	Richlandtown	PA	LPC
70	Presbyterian Villages of Michigan	Village of Hillside	Harbor Springs	MI	IL
100	Western Home Communities	Western Home Communities	Cedar Falls	IA	IL
109	National Lutheran Inc. fka National Lutheran Home for the Aged	The Village at Olrcharid Ridge	Winchester	VA	LPC
114	Mather LifeWays	Mather Place	Wilmette	IL	IL
142	Moorings Park	Moorings Park at Grey Oaks	Naples	FL	IL

Note: Due to the number of expansions & repositionings in 2016, the cut-off point was less than 20 units. There were an additional 18 communities that expanded in 2016. fka: Formerly known as

5-9 2017 LeadingAge Ziegler 150

Growth: New Communities 5-9a 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.*

5-9 2017 LeadingAge Ziegler 150

Growth: New Communities

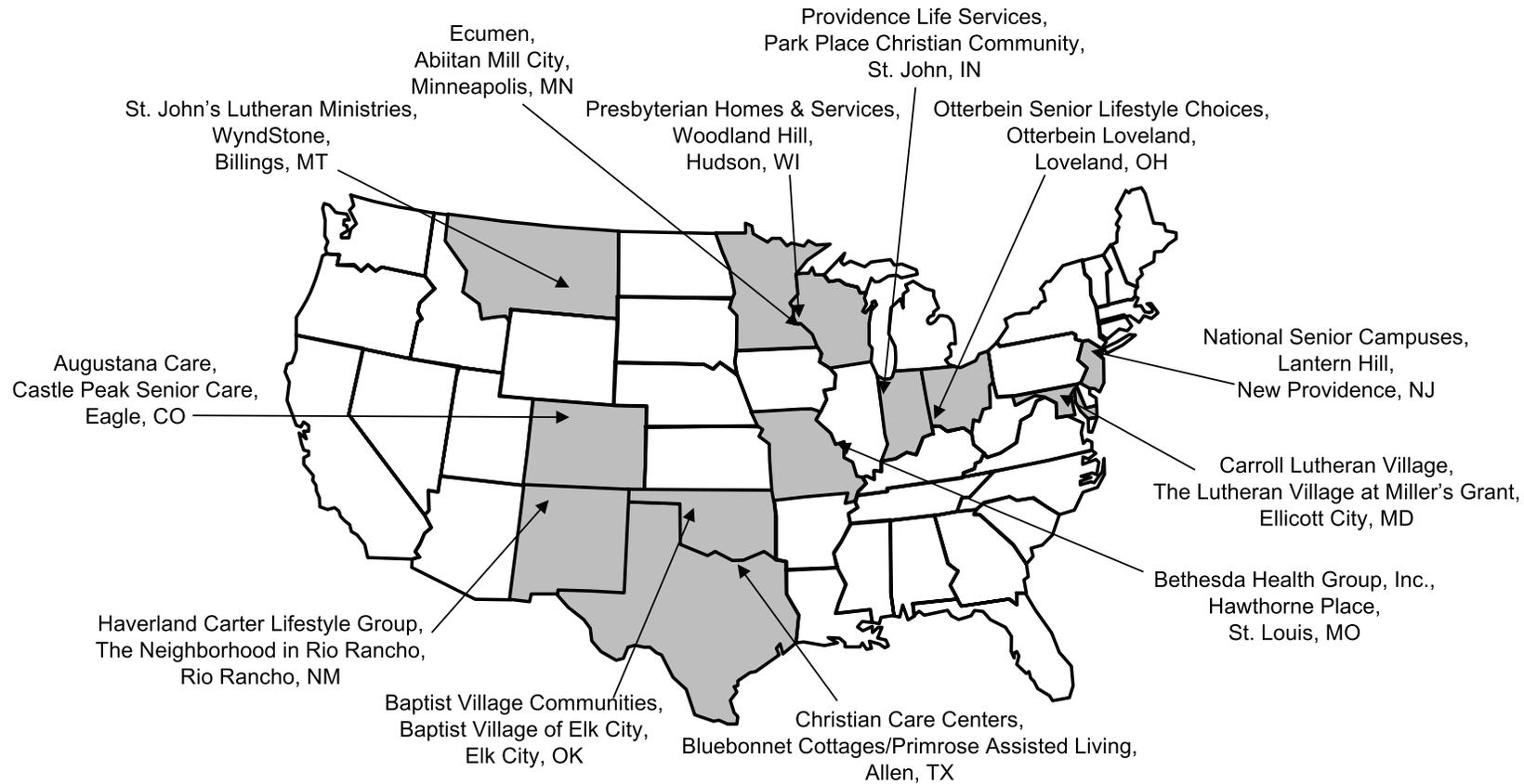
5-9b 2016 COMMUNITY OPENINGS

2017 Rank	System Name	Community	City	State	Community Type
1	National Senior Campuses	Lantern Hill	New Providence	NJ	LPC
4	Presbyterian Homes & Services	Woodland Hill	Hudson	WI	IL
25	Ecumen	Abiitan Mill City	Minneapolis	MN	IL
30	Augustana Care	Castle Peak Senior Care	Eagle	CO	NH
32	Otterbein Senior Lifestyle Choices	Otterbein Loveland	Loveland	OH	LPC
40	Providence Life Services	Park Place Christian Community of St. John	St. John	IN	LPC
43	Bethesda Health Group, Inc.	Hawthorne Place	St. Louis	MO	AL
58	Baptist Village Communities	Baptist Village of Elk City	Elk City	OK	AL
103	Carroll Lutheran Village/The Lutheran Village at Miller's Grant	Lutheran Village at Miller's Grant	Ellicott City	MD	LPC
105	Christian Care Centers, Inc.	Bluebonnet Cottages / Primrose AL Units	Allen	TX	AL
113	Haverland Carter Lifestyle Group	The Neighborhood in Rio Rancho	Rio Rancho	NM	LPC
140	St. John's Lutheran Ministries	WyndStone	Billings	MT	IL

5-9 2017 LeadingAge Ziegler 150

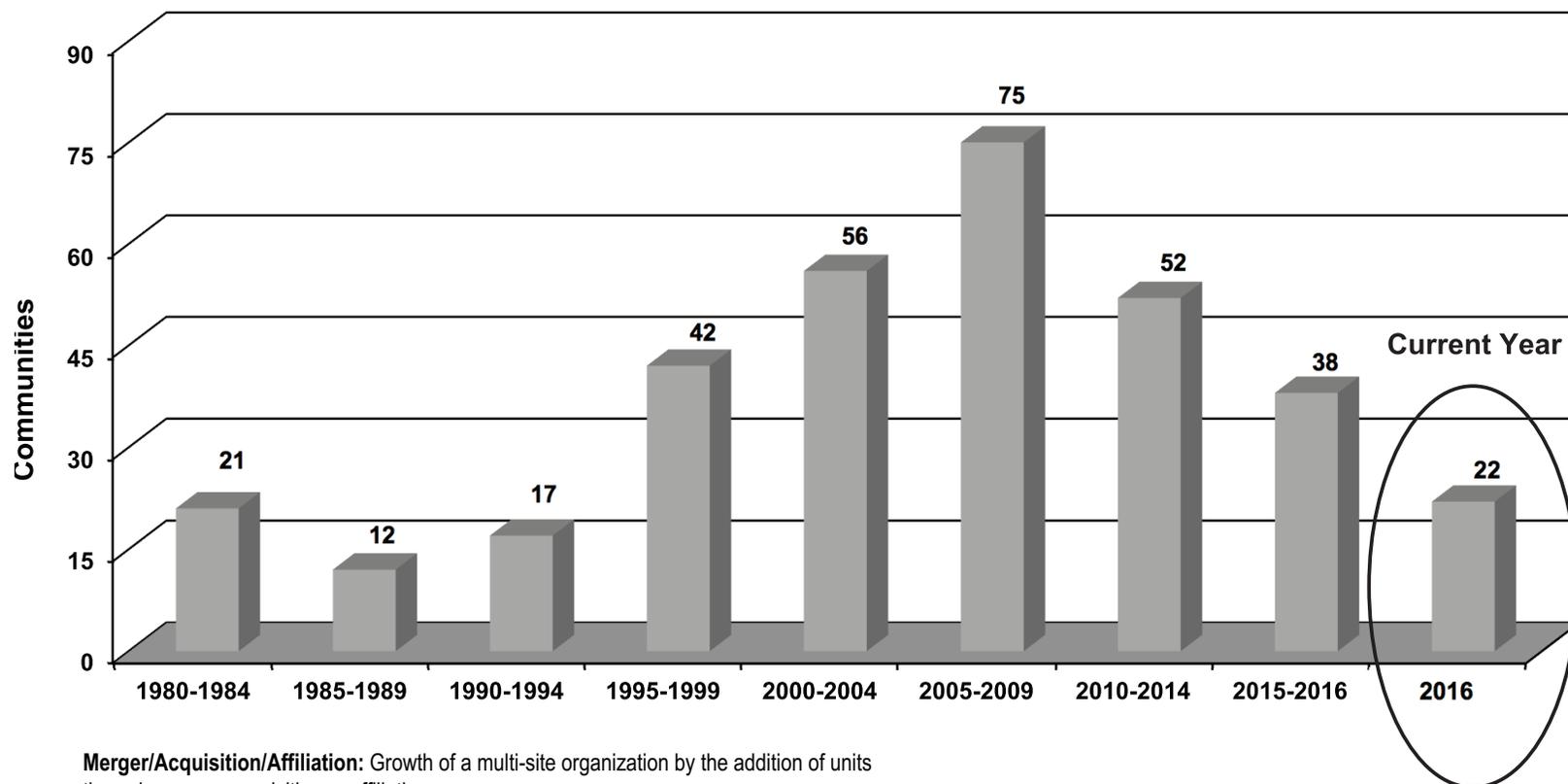
Growth: New Communities

5-9c 2016 LOCATIONS



5-10 2017 LeadingAge Ziegler 150

Growth: Mergers/Acquisitions/Affiliations 5-10a HISTORICAL GROWTH



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

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

5-10 2017 LeadingAge Ziegler 150

Growth: Mergers/Acquisitions/Affiliations

5-10b 2016 MERGERS/ACQUISITIONS/AFFILIATIONS

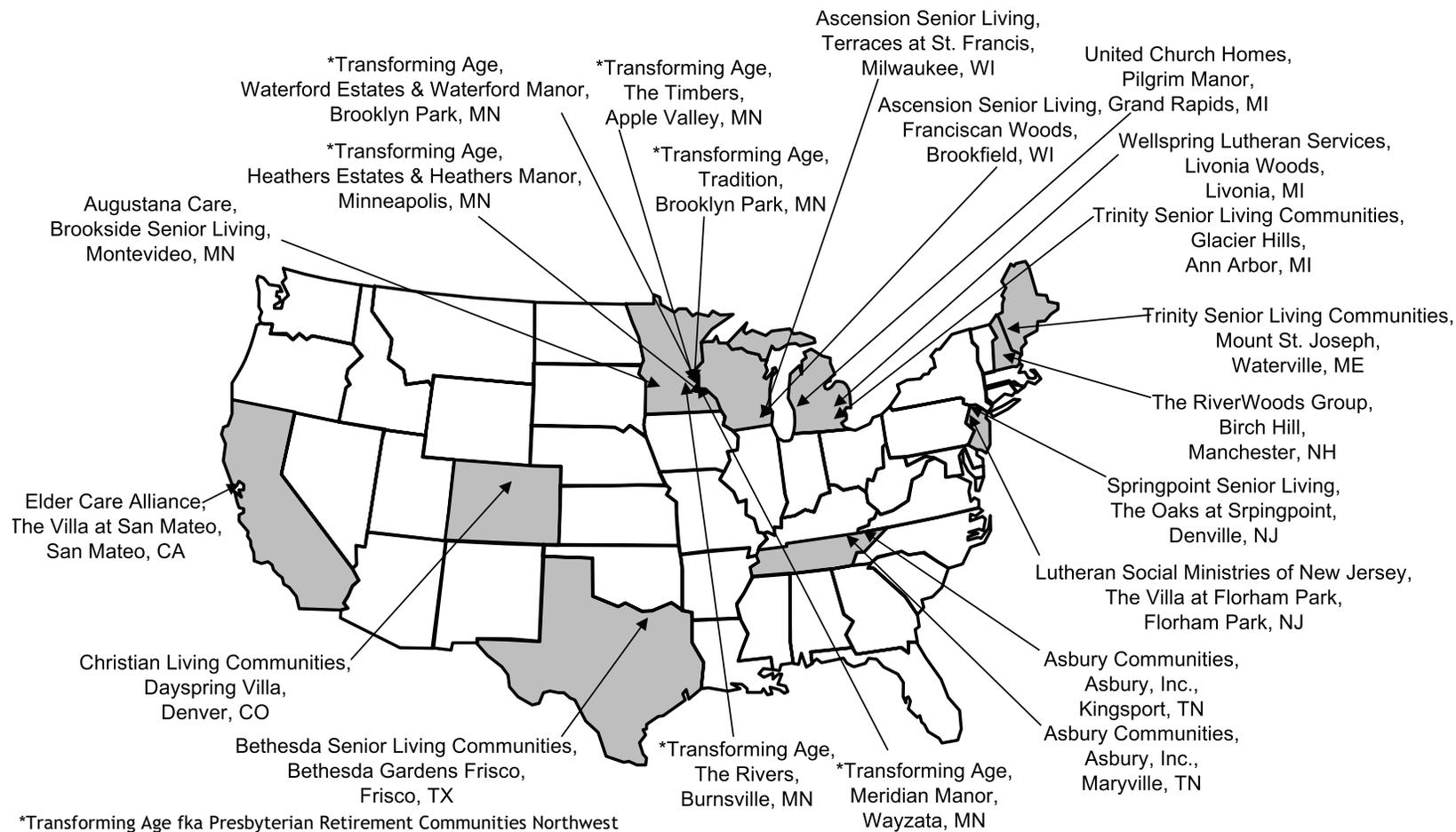
2017 Rank	System Name	Community	City	State	Community Type
8	Ascension Senior Living	Franciscan Woods	Brookfield	WI	NH
8	Ascension Senior Living	Terrace St. Francis	Milwaukee	WI	NH
9	Trinity Senior Living Communities fka Trinity Health Senior Communities	Glacier Hills	Ann Arbor	MI	LPC
9	Trinity Senior Living Communities fka Trinity Health Senior Communities	Mount St. Joseph	Waterville	ME	NH
15	Asbury Communities	Asbury, Inc.	Maryville & Kingsport	TN	LPC
27	Springpoint Senior Living Inc.	The Oaks at Springpoint	Denville	NJ	LPC
30	Augustana Care	Brookside Senior Living	Montevideo	MN	IL
48	Transforming Age fka Presbyterian Retirement Communities Northwest	Heathers Estates	Minneapolis	MN	IL
48	Transforming Age fka Presbyterian Retirement Communities Northwest	Heathers Manor	Minneapolis	MN	AL
48	Transforming Age fka Presbyterian Retirement Communities Northwest	Meridian Manor	Wayzata	MN	AL
48	Transforming Age fka Presbyterian Retirement Communities Northwest	The Rivers	Burnsville	MN	IL
48	Transforming Age fka Presbyterian Retirement Communities Northwest	The Timbers	Apple Valley	MN	IL
48	Transforming Age fka Presbyterian Retirement Communities Northwest	Tradition	Brooklyn Park	MN	IL
48	Transforming Age fka Presbyterian Retirement Communities Northwest	Waterford Estates	Brooklyn Park	MN	IL
48	Transforming Age fka Presbyterian Retirement Communities Northwest	Waterford Manor	Brooklyn Park	MN	AL
49	Bethesda Senior Living Communities	Bethesda Gardens Frisco	Frisco	TX	AL
57	United Church Homes, Inc.	Pilgrim Manor	Grand Rapids	MI	AL
110	Christian Living Communities	Dayspring Villa	Denver	CO	AL
117	Wellspring Lutheran Services	Livonia Woods	Livonia	MI	NH
118	Lutheran Social Ministries of New Jersey, Inc.	The Villa at Florham Park, Inc.	Florham Park	NJ	NH
129	The RiverWoods Group	Birch Hill	Manchester	NH	LPC
143	Elder Care Alliance	The Villa at San Mateo	San Mateo	CA	IL

fka: Formerly known as

5-10 2017 LeadingAge Ziegler 150

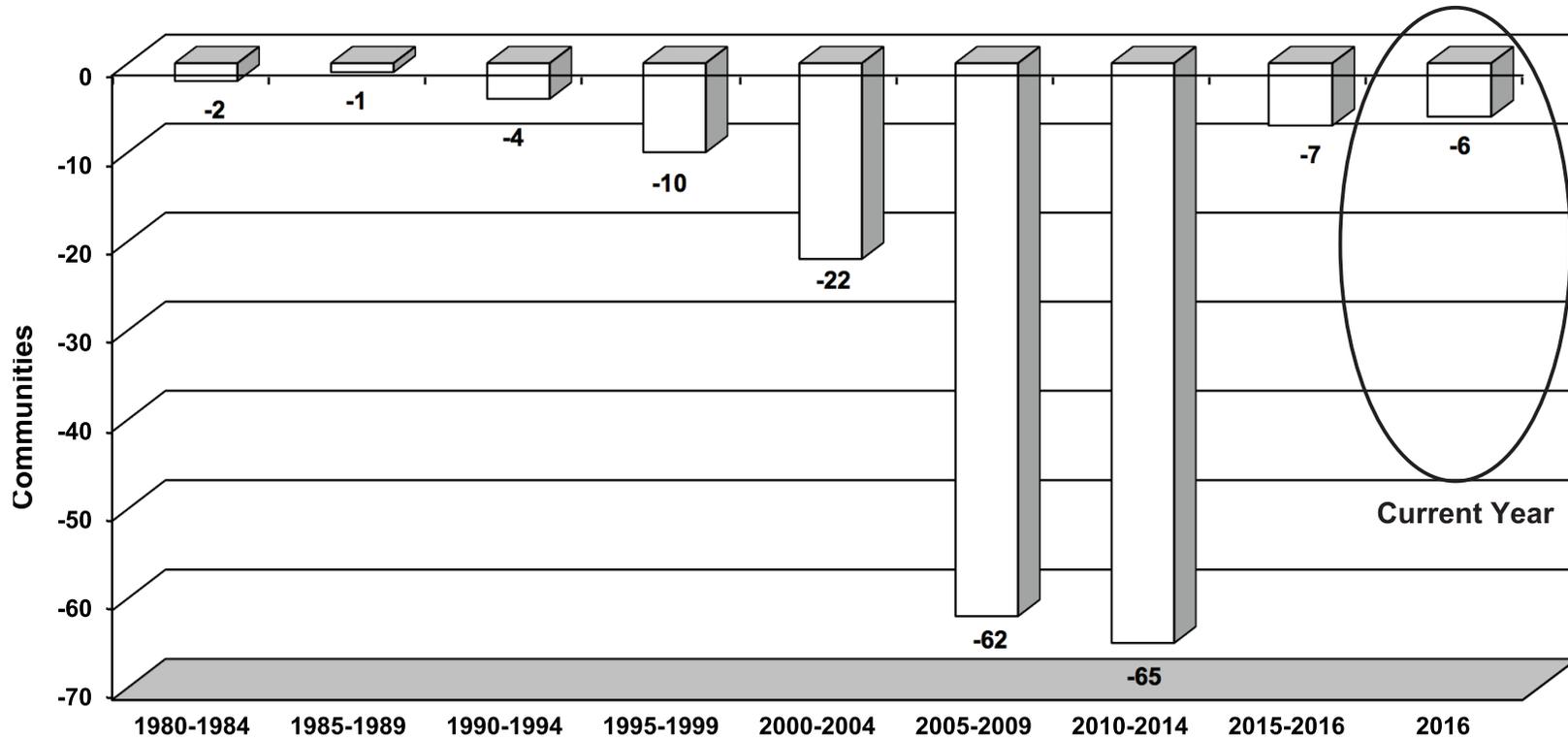
Growth: Mergers/Acquisitions/Affiliations

5-10c 2016 LOCATIONS



5-11 2017 LeadingAge Ziegler 150

Growth: Dispositions 5-11a HISTORICAL GROWTH



Disposition: The sale or closure of a community.

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

5-11 2017 LeadingAge Ziegler 150

Growth: Dispositions

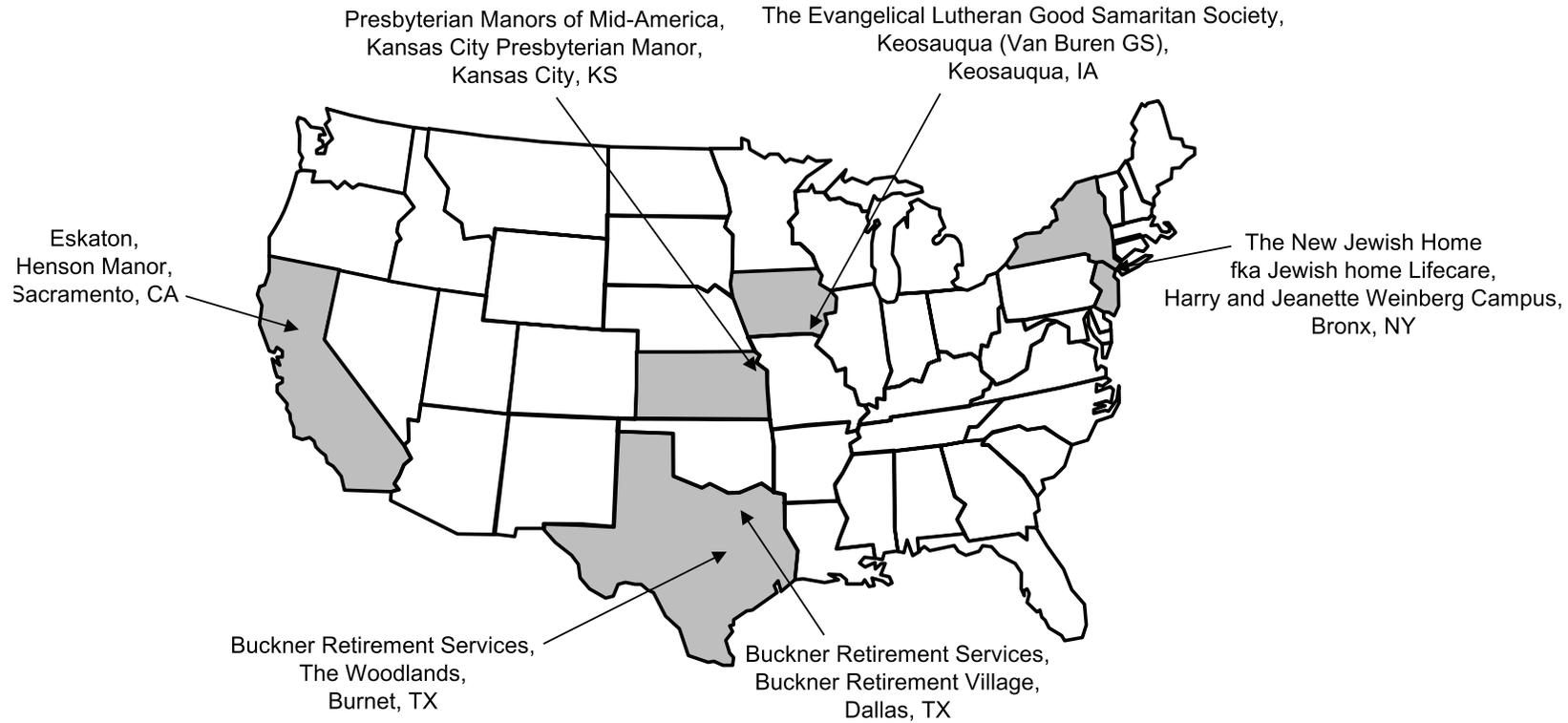
5-11b 2016 COMMUNITY CLOSURES OR DISPOSITIONS

2017 Rank	System Name	Community	City	State	Community Type
2	The Evangelical Lutheran Good Samaritan Society	Keosauqua (Van Buren GS)	Keosauqua	IA	NH
26	Presbyterian Manors of Mid-America, Inc.	Kansas City Presbyterian Manor	Kansas City	KS	NH
59	Buckner Retirement Services, Inc.	Buckner Retirement Village	Dallas	TX	IL
59	Buckner Retirement Services, Inc.	The Woodlands	Burnet	TX	IL
61	Eskaton	Eskaton Henson Manor	Sacramento	CA	IL
104	The New Jewish Home fka Jewish Home Lifecare	Harry and Jeanette Weinberg Campus	Bronx	NY	NH

fka: Formerly known as

5-11 2017 LeadingAge Ziegler 150

Growth: Dispositions 5-11c 2016 LOCATIONS



LeadingAge 150 Ziegler

Chapter 6

Additional Listings

Three additional listings have been added to LZ 150 since its inaugural publication: single-campus senior living, affordable housing providers, and multi-site senior living that include affordable housing units. While some of the organizations on these lists may also appear in 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 6.1a-c are not part of a system, but are single-site organizations. These organizations may offer additional services, such as home-based care in the greater community, but oversee only one facility-based operation. The clear majority of these organizations are Life Plan Communities.

Chart 6-1b shows that 63% of these organizations offer some type of home-based care, either to 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.

Largest Individual Campuses

Added back into the publication last year is a listing of the largest not-for-profit campuses in the country, regardless of whether they are a single-campus community or part of a multi-site organization within the LZ 150 (Chart 6-1d). The largest campus, Riderwood Village (MD), has a total of 2,180 market-rate units.

Affordable Housing Providers

Using the LeadingAge Directory of Members and LeadingAge contact information, systems providing affordable (non-market-rate) and government-subsidized housing were researched and ranked according to the number of affordable housing units offered. This listing includes many organizations that are not on the LZ 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 #37 (**Primary Ranking**) with 1,809 total market-rate units; the organization is ranked #4 among this year's listing of affordable housing providers with 16,382 total affordable housing units (Chart 6-2), an increase of roughly 102 affordable units in the past year. By aggregating these two categories of senior housing, the organization is the largest among the LZ 150 with 18,910 total units.

6-1 2017 LeadingAge Ziegler 150

Additional Listings: Single-Campus Senior Living Communities

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

2017 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/16)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
1	Charlestown Community, Inc.	Catonsville	MD	1,815	1,484	125	206	81.8%	6.9%	11.3%
2	John Knox Village	Lee's Summit	MO	1,606	996	180	430	62.0%	11.2%	26.8%
3	The Mennonite Village	Albany	OR	1,048	298	131	619	28.4%	12.5%	59.1%
4	Henry Ford Village	Dearborn	MI	1,041	856	96	89	82.2%	9.2%	8.5%
5	The Hebrew Home at Riverdale	Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
6	Panorama	Lacey	WA	985	785	45	155	79.7%	4.6%	15.7%
7	John Knox Village of Florida, Inc.	Pompano Beach	FL	938	719	64	155	76.7%	6.8%	16.5%
8	Cross Keys Village - The Brethren Home Community	New Oxford	PA	893	500	123	270	56.0%	13.8%	30.2%
9	Westminster Canterbury Richmond	Richmond	VA	829	504	167	158	60.8%	20.1%	19.1%
10	St. John's Homes & Meadows	Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
11	Friendship Village of 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	Brethren Village	Lititz	PA	786	505	141	140	64.2%	17.9%	17.8%
14	Charles E. Smith Life Communities	Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
15	Mennonite Home Communities	Lancaster	PA	781	443	150	188	56.7%	19.2%	24.1%
16	Lakeview Village, Inc.	Lenexa	KS	748	550	26	172	73.5%	3.5%	23.0%
17	Glencroft Retirement Community	Glendale	AZ	715	391	99	225	54.7%	13.8%	31.5%
18	Indiana Masonic Home	Franklin	IN	702	120	317	265	17.1%	45.2%	37.7%
19	Atlantic Shores Cooperative Association	Atlantic Shores	VA	671	555	66	50	82.7%	9.8%	7.5%
20	The Beattitudes Campus	Phoenix	AZ	652	459	121	72	70.4%	18.6%	11.0%
21	Copeland Oaks	Sebring	OH	638	341	107	190	53.4%	16.8%	29.8%
22	Army Residence Community	San Antonio	TX	637	468	78	91	73.5%	12.2%	14.3%
23	Miami Jewish Health Systems, Inc.	Miami	FL	637	99	100	438	15.5%	15.7%	68.8%
24	Westminster-Canterbury on Chesapeake Bay	Virginia Beach	VA	633	442	96	95	69.8%	15.2%	15.0%
25	La Posada at Park Centre Inc.	Green Valley	AZ	612	468	144	0	76.5%	23.5%	0.0%

6-1 2017 LeadingAge Ziegler 150

Additional Listings: Single-Campus Senior Living Communities

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

2017 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/16)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	Carolina Meadows, Inc.	Chapel Hill	NC	608	443	79	86	72.9%	13.0%	14.1%
27	Kirby Pines	Memphis	TN	590	426	74	90	72.2%	12.5%	15.3%
28	Altavita fka Air Force Village West	Riverside	CA	589	440	90	59	74.7%	15.3%	10.0%
29	Springmoor Life Care Retirement Community	Raleigh	NC	589	398	18	173	67.6%	3.1%	29.4%
30	St. Joseph's John Knox Village	Tampa	FL	589	265	161	163	45.0%	27.3%	27.7%
31	Tel Hai Retirement Community	Honey Brook	PA	577	338	100	139	58.6%	17.3%	24.1%
32	Twin Lakes Community	Burlington	NC	572	400	52	120	69.9%	9.1%	21.0%
33	The Philadelphia Protestant Home	Philadelphia	PA	567	266	175	126	46.9%	30.9%	22.2%
34	Franklin United Methodist Community	Franklin	IN	563	194	160	208	34.5%	28.4%	36.9%
35	St. Camillus	Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
36	Casa de las Campanas	San Diego	CA	548	377	72	99	68.8%	13.1%	18.1%
37	Mennonite Village	Albany	OR	547	321	131	95	58.7%	23.9%	17.4%
38	Rolling Green Village	Greenville	SC	544	420	50	74	77.2%	9.2%	13.6%
39	Royal Oaks Life Care Community	Sun City	AZ	535	360	175	0	67.3%	32.7%	0.0%
40	Masonic Care Community	Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
41	Pine Run Community	Doylestown	PA	525	288	147	90	54.9%	28.0%	17.1%
42	Fleet Landing	Atlantic Beach	FL	515	354	101	60	68.7%	19.6%	11.7%
43	The Lutheran Home	Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
44	The Advent Christian Village	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
45	Warm Hearth Village	Blacksburg	VA	509	299	150	60	58.7%	29.5%	11.8%
46	Riddle Village	Media	PA	499	364	49	86	72.9%	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	Sunset Hills	MO	497	318	61	118	64.0%	12.3%	23.7%
49	The Estates at Carpenters	Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%
50	Lebanon Valley Brethren Home	Palmyra	PA	493	360	33	100	73.0%	6.7%	20.3%

6-1 2017 LeadingAge Ziegler 150

Additional Listings: Single-Campus Senior Living Communities

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

2017 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/16)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	Marquette	Indianapolis	IN	493	314	77	102	63.7%	15.6%	20.7%
52	Deerfield Episcopal Retirement Community, Inc.	Asheville	NC	485	361	62	62	74.4%	12.8%	12.8%
53	Horizon House	Seattle	WA	482	377	105	0	78.2%	21.8%	0.0%
54	Montereau, Inc.	Tulsa	OK	475	328	73	74	69.1%	15.4%	15.6%
55	St. Mark Village, Inc.	Palm Harbor	FL	474	264	130	80	55.7%	27.4%	16.9%
56	Cypress Cove at HealthPark Florida, Inc.	Ft. Myers	FL	470	362	44	64	77.0%	9.4%	13.6%
57	Virginia Mennonite Retirement Community	Harrisonburg	VA	469	263	86	120	56.1%	18.3%	25.6%
58	White Horse Village Inc.	Newtown Square	PA	468	341	68	59	72.9%	14.5%	12.6%
59	Marquardt Village	Watertown	WI	464	276	48	140	59.5%	10.3%	30.2%
60	Masonic Village at Burlington	Burlington	NJ	459	85	75	299	18.5%	16.3%	65.1%
61	Carolina Village	Hendersonville	NC	456	338	60	58	74.1%	13.2%	12.7%
62	Aldersgate UMRC, Inc.	Charlotte	NC	456	248	108	100	54.4%	23.7%	21.9%
63	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
64	Waterman Village	Mount Dora	FL	454	257	77	120	56.6%	17.0%	26.4%
65	Bridgewater Retirement Community	Bridgewater	VA	453	240	86	127	53.0%	19.0%	28.0%
66	Paradise Valley Estates	Fairfield	CA	451	323	68	60	71.6%	15.1%	13.3%
67	Emerald Heights	Redmond	WA	450	333	56	61	74.0%	12.4%	13.6%
68	North Hill Needham Inc.	Needham	MA	447	330	45	72	73.8%	10.1%	16.1%
69	Lutheran Social Services of Upstate New York	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
70	Aldersgate Village	Topeka	KS	445	176	60	209	39.6%	13.5%	47.0%
71	Falcons Landing	Sterling	VA	444	313	71	60	70.5%	16.0%	13.5%
72	Greenwood Village South	Greenwood	IN	442	256	49	137	57.9%	11.1%	31.0%
73	Arbor Acres United Methodist Retirement Community, Inc.	Winston-Salem	NC	441	261	97	83	59.2%	22.0%	18.8%
74	Mt. San Antonio Gardens	Pomona	CA	440	297	71	72	67.5%	16.1%	16.4%
75	Cornwall Manor	Cornwall	PA	438	312	30	96	71.2%	6.8%	21.9%

6-1 2017 LeadingAge Ziegler 150

Additional Listings: Single-Campus Senior Living Communities

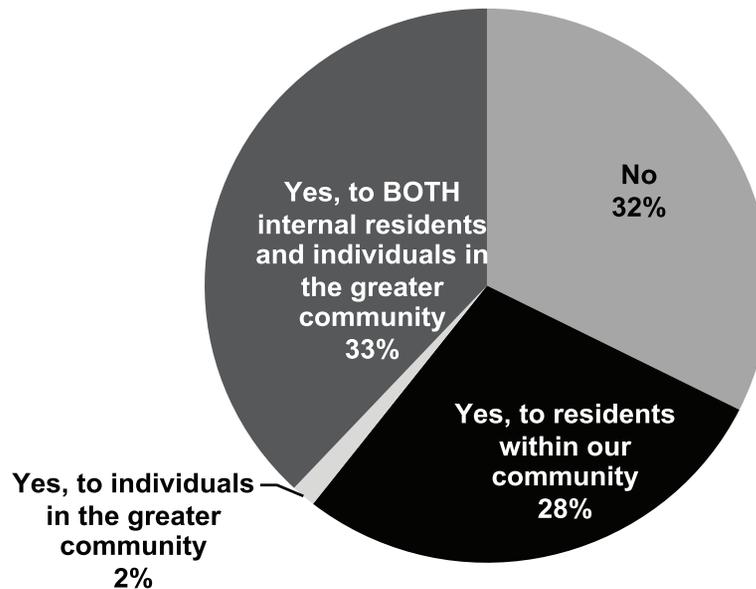
6-1a THE NATION'S 100 LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING

2017 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/16)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	Mease Manor Retirement Community	Dunedin	FL	436	196	140	100	45.0%	32.1%	22.9%
77	Carol Woods Retirement Community	Chapel Hill	NC	431	312	59	60	72.4%	13.7%	13.9%
78	Williamsburg Landing, Inc.	Williamsburg	VA	431	312	61	58	72.4%	14.2%	13.5%
79	O'Connor Woods	Stockton	CA	428	251	77	100	58.6%	18.0%	23.4%
80	Laurel Lake Retirement Community	Hudson	OH	426	292	59	75	68.5%	13.8%	17.6%
81	St. Paul Homes	Greenville	PA	426	96	144	192	22.5%	33.8%	45.1%
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	C. C. Young Memorial Home	Dallas	TX	422	223	111	88	52.8%	26.3%	20.9%
85	Dunwoody Village	Newtown Square	PA	413	251	81	81	60.8%	19.6%	19.6%
86	Meadowood	Worcester	PA	411	296	56	59	72.0%	13.6%	14.4%
87	Tabor Hills Senior Living	Naperville	IL	410	104	95	211	25.4%	23.2%	51.5%
88	Westminster Canterbury of Lynchburg	Lynchburg	VA	408	240	63	105	58.8%	15.4%	25.7%
89	Willamette View, Inc.	Portland	OR	405	287	112	6	70.9%	27.7%	1.5%
90	Friendship Village Chesterfield	Chesterfield	MO	403	282	22	99	70.0%	5.5%	24.6%
91	Bay Village of Sarasota, Inc.	Sarasota	FL	402	285	22	95	70.9%	5.5%	23.6%
92	Penney Retirement Community, Inc.	Penney Farms	FL	401	286	75	40	71.3%	18.7%	10.0%
93	Bishop Gadsden Episcopal Retirement Community	Charleston	SC	399	260	89	50	65.2%	22.3%	12.5%
94	Kahala Nui	Honolulu	HI	397	270	67	60	68.0%	16.9%	15.1%
95	EdenHill Communities	New Braunfels	TX	395	151	67	177	38.2%	17.0%	44.8%
96	Pennswood Village	Newtown	PA	393	303	37	53	77.1%	9.4%	13.5%
97	Fellowship Senior Living	Basking Ridge	NJ	392	257	81	54	65.6%	20.7%	13.8%
98	Westminster-Canterbury of the Blue Ridge	Charlottesville	VA	390	281	57	52	72.1%	14.6%	13.3%
99	Quarryville Presbyterian Retirement Community	Quarryville	PA	385	206	69	110	53.5%	17.9%	28.6%
100	Miriam Osborn Memorial Home	Rye	NY	382	188	0	0	49.2%	0.0%	0.0%
								59.1%	16.0%	24.4%

6.1 2017 LeadingAge Ziegler 150

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

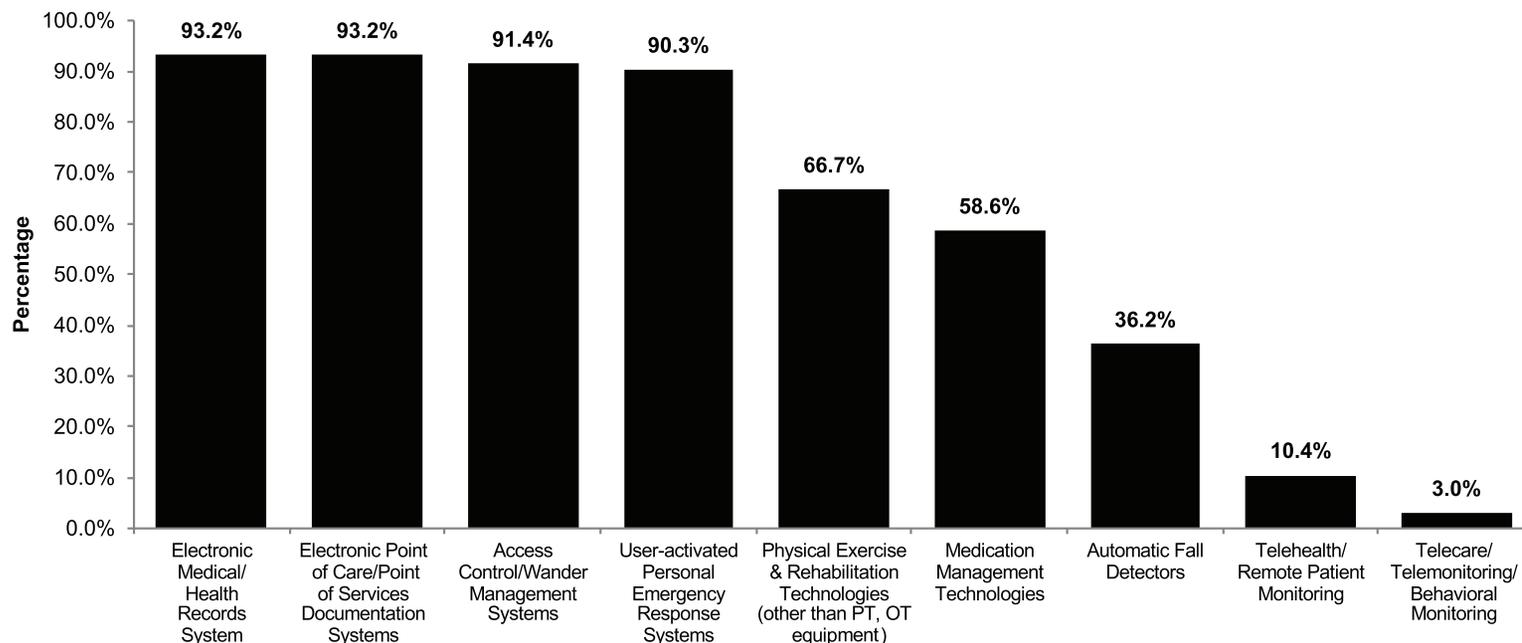
Do you currently offer any type of Home & Community-Based Services?



N=71

6.1 2017 LeadingAge Ziegler 150

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



n = 71 (avg)

6-1 2016 LeadingAge Ziegler 150

Additional Listings: Largest Individual Campuses Listing

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

2017 Rank	2016 Rank	System Name	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/16)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
1	1	Riderwood Village	National Senior Campuses	Silver Spring	MD	2,180	1,819	247	114	83.4%	11.3%	5.2%
2	2	Oak Crest Village	National Senior Campuses	Parkville	MD	1,855	1,525	130	200	82.2%	7.0%	10.8%
3	4	Shell Point Retirement Community	The Christian & Missionary Alliance Foundation, Inc.	Fort Myers	FL	1,835	1,268	369	198	81.8%	6.9%	11.3%
4	3	Charlestown Community, Inc.		Catonsville	MD	1,815	1,484	125	206	81.8%	6.9%	11.3%
5	6	Greenspring Village	National Senior Campuses	Springfield	VA	1,685	1,405	144	136	83.4%	8.5%	8.1%
6	5	Cedar Crest Village	National Senior Campuses	Pompton Plains	NJ	1,669	1,475	81	113	88.4%	4.9%	6.8%
7	7	Ann's Choice	National Senior Campuses	Warminster	PA	1,617	1,485	44	88	91.8%	2.7%	5.4%
8	8	John Knox Village		Lee's Summit	MO	1,606	996	180	430	63.0%	9.8%	27.2%
9	9	Brooksby Village	National Senior Campuses	Peabody	MA	1,570	1,344	122	104	85.6%	7.8%	6.6%
10	10	Masonic Village at Elizabethtown	Masonic Villages of the Grand Lodge of Pennsylvania	Elizabethtown	PA	1,547	961	133	453	62.1%	8.6%	29.3%
11	11	Seabrook Village	National Senior Campuses	Tinton Falls	NJ	1,243	1,061	96	86	85.4%	7.7%	6.9%
12	12	Maris Grove	National Senior Campuses	Glen Mills	PA	1,210	1,033	89	88	85.4%	7.4%	7.3%
13	13	Asbury Methodist Village	Asbury Communities	Gaithersburg	MD	1,200	810	133	257	67.5%	11.1%	21.4%
14	22	Fox Run Village	National Senior Campuses	Novi	MI	1,183	1,051	88	44	88.8%	7.4%	3.7%
15	14	Linden Ponds	National Senior Campuses	Hingham	MA	1,114	982	88	44	82.2%	9.2%	8.5%
16	15	Henry Ford Village		Dearborn	MI	1,041	856	96	89	13.3%	0.0%	86.7%
17	17	The Hebrew Home at Riverdale		Riverdale	NY	1,004	134	0	870	79.2%	5.1%	15.7%
18	18	Panorama		Lacey	WA	985	785	45	155	79.7%	4.6%	15.7%
19	16	Friendship Village of Schaumburg	Friendship Senior Options	Schaumburg	IL	962	608	106	248	76.7%	6.8%	16.5%
20	19	Willow Valley Lakes Manor	Willow Valley Communities	Lancaster	PA	952	724	143	85	28.3%	8.8%	62.9%
21	20	John Knox Village of Florida, Inc.		Pompano Beach	FL	938	719	64	155	76.7%	6.8%	16.5%
22	35	Ashby Ponds	National Senior Campuses	Ashburn	VA	929	786	99	44	61.0%	20.1%	18.9%
23	54	Kissimmee Good Sam. Retirement Village	The Evangelical Lutheran Good Samaritan Society	Kissimmee	FL	905	696	39	170	56.5%	11.0%	32.6%
24	24	Cross Keys Village - The Brethren Home Community		New Oxford	PA	893	500	123	270	56.0%	13.8%	30.2%
25	23	Westminster-Canterbury Richmond		Richmond	VA	829	504	167	158	41.6%	0.0%	58.4%

6-1 2017 LeadingAge Ziegler 150

Additional Listings: Largest Individual Campuses Listing

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

2017 Rank	2016 Rank	System Name	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/16)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
26	26	St. John's Homes & Meadows		Rochester	NY	814	339	0	475	72.4%	11.5%	16.1%
27	27	Friendship Village of Tempe		Tempe	AZ	794	575	91	128	25.3%	29.1%	45.6%
28	28	Rogue Valley Manor	Pacific Retirement Services	Medford	OR	792	605	83	104	56.7%	19.2%	24.1%
29	29	Menorah Park Center for Senior Living		Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
30	32	Brethren Village		Lititz	PA	786	505	141	140	65.9%	18.4%	15.7%
31	65	Wind Crest Village	National Senior Campuses	Highlands Ranch	CO	783	782	1	0	99.9%	0.1%	0.0%
32	21	Charles E. Smith Life Communities		Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
33	30	Mennonite Home Communities		Lancaster	PA	781	443	150	188	56.7%	19.2%	24.1%
34	31	Greencroft Goshen	Greencroft Communities	Goshen	IN	778	409	129	240	52.6%	16.6%	30.8%
35	33	Luther Manor	Luther Manor	Wauwatosa	WI	762	381	158	223	73.2%	3.5%	23.3%
36	36	Otterbein Lebanon Retirement Community	Otterbein Senior Lifestyle Choices	Lebanon	OH	754	450	48	256	59.7%	6.4%	34.0%
37	37	Lakeview Village, Inc.		Lenexa	KS	748	550	26	172	54.7%	13.8%	31.5%
38	38	Laclede Groves	Lutheran Senior Services	Webster Groves	MO	745	383	133	229	51.4%	17.9%	30.7%
39	NR	Indian River Estates East & West	Acts Retirement-Life Communities	Vero Beach	FL	743	553	70	120	74.4%	9.4%	16.2%
40	NR	Highland Springs	National Senior Campuses	Dallas	TX	742	742	0	0	100.0%	0.0%	0.0%
41	42	Western Home Communities Main Campus	Western Home Communities	Cedar Falls	IA	734	404	198	132	55.0%	27.0%	18.0%
42	NR	Glencroft Retirement Community		Glendale	AZ	715	391	99	225	82.7%	9.8%	7.5%
43	40	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	715	330	249	136	46.2%	34.8%	19.0%
44	41	Willow Valley Manor North	Willow Valley Communities	Lancaster	PA	711	472	107	132	66.4%	15.0%	18.6%
45	NR	Indiana Masonic Home		Franklin	IN	702	120	317	265	17.1%	45.2%	37.7%
46	44	Atlantic Shores		Atlantic Shores	VA	671	555	66	50	70.4%	18.6%	11.0%
47	45	Waverly Gardens	Presbyterian Homes & Services	North Oaks	MN	669	77	429	163	53.4%	16.8%	29.8%
48	46	Raybrook Manor	Holland Home	Grand Rapids	MI	665	299	265	101	15.5%	15.7%	68.8%
49	47	St. Ann's Community	St. Ann's Community	Rochester	NY	662	120	120	422	73.5%	12.2%	14.3%
50	48	The Beattitudes Campus		Phoenix	AZ	652	459	121	72	69.9%	15.1%	15.0%

NR: Not ranked in that year

6-1 2017 LeadingAge Ziegler 150

Additional Listings: Largest Individual Campuses Listing

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

2017 Rank	2016 Rank	System Name	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/16)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
51	49	Copeland Oaks		Sebring	OH	638	341	107	190	53.4%	16.8%	29.8%
52	51	The Army Residence Community		San Antonio	TX	637	468	78	91	73.5%	12.2%	14.3%
53	50	Miami Jewish Health Systems, Inc.		Miami	FL	637	99	100	438	15.5%	15.7%	68.8%
54	52	Westminster-Canterbury on Chesapeake Bay		Virginia Beach	VA	633	442	96	95	69.8%	15.2%	15.0%
55	53	Loretto Brighton Campus	Loretto	Syracuse	NY	633	0	79	554	0.0%	12.5%	87.5%
56	55	The Village in Gainesville	SantaFe Senior Living	Gainesville	FL	630	497	133	0	78.9%	21.1%	0.0%
57	43	Garden Spot Village	Garden Spot Communities	New Holland	PA	628	542	86	0	86.3%	13.7%	0.0%
58	56	Landis Homes	Landis Communities	Lititz	PA	624	440	81	103	72.2%	13.0%	14.8%
59	58	Fellowship Square-Tucson Campus	Christian Care Companies	Tucson	AZ	615	555	60	0	76.2%	23.8%	0.0%
60	59	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	74.7%	15.3%	10.0%
61	61	La Posada at Park Centre Inc.		Green Valley	AZ	612	468	144	0	67.6%	3.1%	29.4%
62	57	Messiah Village	Messiah Lifeways	Mechanicsburg	PA	610	275	157	178	45.0%	27.3%	27.7%
63	60	Carolina Meadows, Inc.		Chapel Hill	NC	608	443	79	86	72.9%	13.0%	14.1%
64	NR	Kirby Pines		Memphis	TN	590	426	74	90	72.2%	12.5%	15.3%
65	62	Altavita fka Air Force Village West		Riverside	CA	589	440	90	59	58.6%	17.3%	24.1%
66	63	Springmoor Life Care Retirement Community		Raleigh	NC	589	398	18	173	67.6%	3.1%	29.4%
67	64	St. Joseph's John Knox Village		Tampa	FL	589	265	161	163	69.9%	9.1%	21.0%
68	66	University Woods fka Oakwood Village West Campus	Oakwood Lutheran Senior Ministries	Madison	WI	577	382	100	95	66.2%	17.3%	16.5%
69	67	Tel Hai Retirement Community		Honey Brook	PA	577	338	100	139	46.9%	30.9%	22.2%
70	68	Bristol Village	National Church Residences	Waverly	OH	576	455	46	75	79.0%	8.0%	13.0%
71	69	Twin Lakes Community		Burlington	NC	572	400	52	120	69.9%	9.1%	21.0%
72	NR	Eagle's Trace	National Senior Campuses	Houston	TX	569	569	0	0	34.5%	28.6%	36.9%
73	70	Asbury Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	70.3%	17.6%	12.1%
74	88	Westminster Oaks	Westminster Communities of Florida	Tallahassee	FL	568	362	86	120	63.7%	15.1%	21.1%
75	71	The Philadelphia Protestant Home		Philadelphia	PA	567	266	175	126	46.9%	30.9%	22.2%

NR: Not ranked in that year
fka: Formerly known as

6-1 2017 LeadingAge Ziegler 150

Additional Listings: Largest Individual Campuses Listing

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

2017 Rank	2016 Rank	System Name	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/16)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
76	73	Moorings Park	Moorings Park	Naples	FL	566	384	76	106	72.2%	9.1%	18.7%
77	72	Luther Acres Senior-Living Community	LutherCare	Lititz	PA	566	346	114	106	51.7%	36.1%	12.2%
78	74	Franklin United Methodist Community		Franklin	IN	562	194	160	208	34.5%	28.5%	37.0%
79	NR	Fellowship Square-Phoenix Campus	Christian Care Companies	Phoenix	AZ	558	404	86	68	68.8%	13.1%	18.1%
80	75	Presbyterian Village North	Presbyterian Communities and Services	North Dallas	TX	556	250	75	231	45.0%	13.5%	41.5%
81	76	Masonicare at Ashlar Village	Masonicare	Wallingford	CT	553	362	191	0	77.2%	9.2%	13.6%
82	79	St. Camillus		Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
83	NR	St. Andrew's Estates North & South	Acts Retirement-Life Communities	Boca Raton	FL	550	426	35	89	77.5%	6.4%	16.2%
84	78	Carroll Lutheran Village	Carroll Lutheran Village	Westminster	MD	549	396	50	103	72.1%	9.1%	18.8%
85	80	Mayflower Gardens	Retirement Housing Foundation	Lancaster	CA	548	500	0	48	91.2%	0.0%	8.8%
86	81	Casa de las Campanas		San Diego	CA	548	377	72	99	68.8%	13.1%	18.1%
87	94	The Mennonite Village		Albany	OR	547	321	131	95	25.2%	15.0%	59.8%
88	82	Croasdaile	The United Methodist Retirement Homes	Durham	NC	546	402	30	114	73.6%	5.5%	20.9%
89	83	Rolling Green Village		Greenville	SC	544	420	50	74	77.2%	9.2%	13.6%
90	NR	The RiverWoods at Exeter	The RiverWoods Group	Exeter	NH	542	393	71	78	54.9%	28.0%	17.1%
91	85	Phoebe Home	Phoebe Ministries	Allentown	PA	541	88	58	395	16.3%	10.7%	73.0%
92	87	Good Samaritan Village of Hastings	The Evangelical Lutheran Good Samaritan Society	Hastings	NE	537	306	51	180	56.9%	25.0%	18.1%
93	84	Royal Oaks Life Care Community		Sun City	AZ	535	360	175	0	67.3%	32.7%	0.0%
94	89	Masonic Care Community		Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
95	90	Mission Ridge / St. John's Lutheran Home	St. John's Lutheran Ministries	Billings	MT	534	122	226	186	22.8%	42.3%	34.8%
96	NR	Forum at Rancho San Antonio		Cupertino	CA	531	319	58	48	26.6%	22.3%	51.1%
97	86	Westminster Place	Presbyterian Homes, Inc.	Evanston	IL	531	255	88	188	48.0%	16.6%	35.4%
98	93	Magnolia Manor / Americus Campus	Magnolia Manor	Americus	GA	528	105	187	236	19.9%	35.4%	44.7%
99	91	Windsor Park Manor	Covenant Retirement Communities	Carol Stream	IL	527	349	101	77	66.2%	19.2%	14.6%
100	NR	Meadowood		Worcester	PA	526	296	56	59	56.3%	10.6%	11.2%

NR: Not ranked in that year

6-2 2017 LeadingAge Ziegler 150

Additional Listings: Affordable Housing Providers

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

2017 Aff. Hsng. Rank	2016 Aff. Hsng. Rank	System Name	State	Units	Communities
1	4	Mercy Housing	CO	22,255	323
2	1	National Church Residences	OH	16,382	251
3	2	Retirement Housing Foundation	CA	11,739	131
4	3	Volunteers of America	VA	10,077	179
5	5	Christian Church Homes of Northern California	CA	5,052	61
6	6	Senior Housing Assistance Group	WA	4,830	26
7	NR	Elderly Housing Development and Operations Corporation	FL	4,412	54
8	25	HumanGood fka Cornerstone (ABHOW & be.group)	CA	3,490	45
9	7	Satellite Housing	CA	3,000	52
10	8	TELACU Residential Management	CA	2,399	33
11	10	Christopher Homes	LA	2,317	19
12	9	Catholic Housing Management	FL	2,246	14
13	11	Presby's Inspired Life	PA	2,241	32
14	12	CARING Housing Ministries	CA	2,127	9
15	13	United Church Homes, Inc.	OH	2,074	49
16	NR	Wesley Senior Ministries	TN	2,015	29
17	18	Embrace Living Communities fka Consecra Housing Network	IL	1,848	28
18	19	Westminster Communities of Florida	FL	1,845	9
19	15	Catholic Charities Senior Communities (Archdiocese of Baltimore)	MD	1,790	24
20	16	Springpoint Senior Living Inc.	NJ	1,785	18
21	35	Episcopal Retirement Services	OH	1,718	26
22	17	Salvation Army Silvercrest Management of California	CA	1,678	19
23	20	Presbyterian Villages of Michigan	MI	1,560	27
24	24	The Evangelical Lutheran Good Samaritan Society	SD	1,494	46
25	21	Oklahoma City Housing Authority	OK	1,386	10

NR: Not ranked in that year
fka: Formerly known as

6-2 2017 LeadingAge Ziegler 150

Additional Listings: Affordable Housing Providers

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

2017 Aff. Hsng. Rank	2016 Aff. Hsng. Rank	System Name	State	Units	Communities
26	22	Catholic Charities of Chicago	IL	1,372	20
27	23	Victory Housing	MD	1,347	16
28	26	New Samaritan Corporation	CT	1,251	31
29	27	Menorah Housing Foundation	CA	1,221	18
30	28	Selfhelp Community Services	NY	1,170	11
31	29	Jewish Community Housing for the Elderly	MA	1,117	8
32	NR	Lutheran Social Services of Illinois	IL	1,083	16
33	30	Presbyterian Senior Living	PA	1,069	14
34	31	Pacific Retirement Services, Inc.	OR	1,045	25
35	32	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	1,041	23
36	33	Union Labor Retirement Association	OR	900	6
37	NR	Wesley Woods Senior Living	GA	890	5
38	34	Lutheran Social Services of Central Ohio	OH	888	21
39	NR	Eskaton	CA	828	13
40	37	Hebrew SeniorLife, Inc.	MA	765	3
41	38	Avesta Housing	ME	742	34
42	39	DePaul Housing Management Corporation	NY	704	14
43	36	Christian Care Communities, Inc.	KY	681	11
44	41	Episcopal Senior Communities	CA	676	6
45	NR	Graceworks Lutheran Services	OH	660	16
46	40	Genacross Lutheran Services fka Lutheran Homes Society	OH	651	12
47	42	Cathedral Foundation of Jacksonville (aka Aging True)	FL	637	4
48	50	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	607	8
49	43	Northern California Presbyterian Homes & Services	CA	599	3
50	44	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	566	12

NR: Not ranked in that year
 fka: Formerly known as
 aka: Also known as

6-2 2017 LeadingAge Ziegler 150

Additional Listings: Affordable Housing Providers

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

2017 Aff. Hsng. Rank	2016 Aff. Hsng. Rank	System Name	State	Units	Communities
51	45	The New Jewish Home fka Jewish Home Lifecare	NY	550	5
52	47	Ecumen	MN	534	11
53	48	Lesley Senior Communities	CA	532	5
54	49	Christian Concern Management and Development Corp	PA	515	6
55	52	Plano Community Home, Inc.	TX	474	7
56	53	CJE Senior Life	IL	461	7
57	54	Lutheran Senior Services	MO	459	6
58	46	Jewish Senior Life of Metropolitan Detroit	MI	459	3
59	51	LSC Service Corporation	OH	455	3
60	55	Community Housing Management Services	CA	443	9
61	56	Lutheran Social Ministries of New Jersey, Inc.	NJ	428	5
62	57	Jewish Community Housing Corporation	NJ	369	3
63	58	Bethany Community Services	MA	364	3
64	59	Phoebe Ministries	PA	356	8
65	60	Greencroft Communities	IN	352	3
66	61	Samaritas fka Lutheran Social Services of Michigan	MI	340	5
67	62	Diakon Lutheran Social Ministries	PA	335	4
68	63	Goodwill Industries Suncoast	FL	335	5
69	64	Family Housing Management Company	FL	326	3
70	65	Covenant Health, Inc.	MA	322	3
71	66	Spokane Baptist Association Homes	WA	321	2
72	67	Methodist Retirement Communities	TX	319	5
73	68	Elderly Housing Management Corporation	FL	314	2
74	71	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	300	5
75	72	Presbyterian Homes & Services	MN	293	3

NR: Not ranked in that year
fka: Formerly known as

6-2 2017 LeadingAge Ziegler 150

Additional Listings: Affordable Housing Providers

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

2017 Aff. Hsng. Rank	2016 Aff. Hsng. Rank	System Name	State	Units	Communities
76	NR	Christian Health Care Center	NJ	275	2
77	73	Porter Hills	MI	270	6
78	74	Lutheran SeniorLife	PA	269	7
79	NR	The National Caucus and Center on Black Aged	DC	267	3
80	75	Santa Clara Methodist Retirement Foundation	CA	257	2
81	76	United Church Homes and Services	NC	252	7
82	77	Sholom Community Alliance	MN	233	3
83	78	Wellspring Lutheran Services	MI	231	5
84	80	Christian Care Companies	AZ	222	3
85	86	Givens Estates	NC	220	2
86	81	Miravida Living fka Lutheran Homes of Oshkosh	WI	217	3
87	82	Older American Housing in Spotswood (now "Woodmere & Crescent Park Senior Housing")	NJ	200	2
88	83	The Saint Elizabeth Community	RI	197	1
89	84	Lutheran Social Services Group	NY	196	6
90	NR	Asbury Communities	MD	187	2
91	87	Jewish Senior Housing & Healthcare	NJ	178	2
92	88	Guardian Angels Senior Services fka Guardian Angels of Elk River	MN	177	5
93	89	Milton Residences for the Elderly	MA	167	3
94	90	Wesley Enhanced Living	PA	162	3
95	NR	Eaton Senior Communities	CO	161	1
96	91	Providence Life Services	IL	160	2
97	93	Loretto	NY	149	4
98	95	Franciscan Communities, Inc.	IL	139	3
99	NR	Episcopal Communities & Services	CA	134	1
100	NR	WRC Senior Services	PA	111	3

NR: Not ranked in that year
fka: Formerly known as

6-3 2017 LeadingAge Ziegler 150

Additional Listings: Multi-site Senior Living Providers

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

Rank	2017 LZ 150 Rank	System Name	State	Units (as of 12/31/16)				
				Total	ILU	ALU	NCB	AFF
1	NR	Mercy Housing	CO	22,255	0	0	0	22,255
2	2	The Evangelical Lutheran Good Samaritan Society	SD	19,333	5,131	2,274	10,434	1,494
3	1	National Senior Campuses	MD	19,051	16,346	1,421	1,284	0
4	37	National Church Residences	OH	18,191	781	508	520	16,382
5	10	Retirement Housing Foundation	CA	15,844	2,635	875	595	11,739
6	22	Volunteers of America	VA	12,512	591	746	1,098	10,077
7	7	HumanGood fka Cornerstone (ABHOW & be.group)	CA	8,251	2,904	937	920	3,490
8	3	ACTS Retirement Services, Inc.	PA	7,862	5,529	901	1,432	0
9	4	Presbyterian Homes & Services	MN	7,428	3,632	2,201	1,302	293
10	5	Benedictine Health System	MN	5,270	625	1,484	3,161	0
11	17	Westminster Communities of Florida	FL	5,115	2,049	470	751	1,845
12	NR	Christian Church Homes of Northern California	CA	5,052	0	0	0	5,052
13	6	Covenant Retirement Communities	IL	5,022	3,155	884	983	0
14	NR	Senior Housing Assistance Group	WA	4,830	0	0	0	4,830
15	9	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	4,805	1,341	640	2,217	607
16	8	Ascension Senior Living	MO	4,732	937	833	2,854	108
17	14	Presbyterian Senior Living	PA	4,596	1,846	547	1,134	1,069
18	NR	Elderly Housing Development and Operations Corporation	FL	4,412	0	0	0	4,412
19	11	Lifespace Communities, Inc.	IA	4,069	3,066	174	829	0
20	27	Springpoint Senior Living Inc.	NJ	4,064	1,649	279	351	1,785
21	13	Lutheran Senior Services	MO	3,994	1,608	733	1,194	459
22	20	Pacific Retirement Services, Inc.	OR	3,901	2,116	333	407	1,045
23	12	The Kendal Corporation	PA	3,758	2,547	656	555	0
24	15	Asbury Communities	MD	3,642	2,119	457	879	187
25	57	United Church Homes, Inc.	OH	3,449	326	275	774	2,074

NR: Not ranked in that year

fka: Formerly known as

6-3 2017 LeadingAge Ziegler 150

Additional Listings: Multi-site Senior Living Providers

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

Rank	2017 LZ 150 Rank	System Name	State	Units (as of 12/31/16)				
				Total	ILU	ALU	NCB	AFF
26	16	Presence Life Connections	IL	3,413	1,090	256	2,016	51
27	88	Presby's Inspired Life	PA	3,166	472	199	254	2,241
28	18	The Carmelite System, Inc.	NY	3,129	144	421	2,564	0
29	19	Ohio Living fka Ohio Presbyterian Retirement Services	OH	3,119	1,596	586	898	39
30	NR	Satellite Housing	CA	3,000	0	0	0	3,000
31	25	Ecumen	MN	2,888	376	1,452	526	534
32	21	Front Porch Communities and Services	CA	2,860	1,965	255	540	100
33	24	Diakon Lutheran Social Ministries	PA	2,754	919	531	969	335
34	70	Presbyterian Villages of Michigan	MI	2,749	915	184	90	1,560
35	44	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	2,634	398	520	675	1,041
36	23	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,433	1,496	253	684	0
37	NR	TELACU Residential Management	CA	2,399	0	0	0	2,399
38	45	Hebrew SeniorLife, Inc.	MA	2,357	659	119	814	765
39	26	Presbyterian Manors of Mid-America, Inc.	KS	2,340	922	579	839	0
40	Next 50	Episcopal Retirement Services	OH	2,336	299	128	191	1,718
41	NR	Christopher Homes	LA	2,317	0	0	0	2,317
42	31	Christian Care Companies	AZ	2,289	1,647	352	68	222
43	46	Episcopal Senior Communities	CA	2,263	1,074	137	376	676
44	NR	Catholic Housing Management	FL	2,246	0	0	0	2,246
45	28	Christian Homes, Inc.	MO	2,189	383	312	1,486	8
46	30	Augustana Care	MN	2,186	269	921	912	84
47	61	Eskaton	CA	2,143	195	694	426	828
48	39	Greencroft Communities	IN	2,133	637	534	610	352
49	NR	CARING Housing Ministries	CA	2,127	0	0	0	2,127
50	29	Shell Point Retirement Community	FL	2,110	1,384	398	328	0

NR: Not ranked in that year

fka: Formerly known as

6-3 2017 LeadingAge Ziegler 150

Additional Listings: Multi-site Senior Living Providers

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

Rank	2017 LZ 150 Rank	System Name	State	Units (as of 12/31/16)				
				Total	ILU	ALU	NCB	AFF
51	34	Franciscan Communities, Inc.	IL	2,089	738	438	774	139
52	32	Otterbein Senior Lifestyle Choices	OH	2,037	786	382	869	0
53	33	Willow Valley Communities	PA	2,024	1,522	219	283	0
54	NR	Wesley Senior Ministries	TN	2,015	0	0	0	2,015
55	35	Concordia Lutheran Ministries	PA	1,898	554	965	379	0
56	40	Providence Life Services	IL	1,873	725	360	628	160
57	36	Senior Quality Lifestyle Corporation	TX	1,858	1,130	419	309	0
58	NR	Embrace Living Communities fka Consecra Housing Network	IL	1,848	0	0	0	1,848
59	52	Covenant Health, Inc.	MA	1,798	0	364	1,112	322
60	NR	Catholic Charities Senior Communities (Archdiocese of Baltimore)	MD	1,790	0	0	0	1,790
61	38	ArchCare	NY	1,782	0	59	1,723	0
62	41	Elim Care, Inc.	MN	1,745	197	452	1,048	48
63	42	Homewood Retirement Centers	MD	1,694	965	278	451	0
64	NR	Salvation Army Silvercrest Management of California	CA	1,678	0	0	0	1,678
65	60	Phoebe Ministries	PA	1,674	374	255	689	356
66	43	Bethesda Health Group, Inc.	MO	1,673	733	78	862	0
67	77	Northern California Presbyterian Homes & Services	CA	1,661	818	103	141	599
68	50	Loretto	NY	1,647	282	593	623	149
69	47	Lutheran Life Communities	IL	1,576	408	407	761	0
70	48	Transforming Age fka Presbyterian Retirement Communities Northwest	WA	1,575	1,050	463	62	0
71	49	Bethesda Senior Living Communities	CO	1,562	155	1,407	0	0
72	51	Magnolia Manor	GA	1,483	339	335	809	0
73	55	Mississippi Methodist Senior Services, Inc.	MS	1,447	776	338	320	13
74	53	WesleyLife	IA	1,440	681	311	448	0
75	54	Presbyterian Homes	IL	1,437	855	217	365	0

NR: Not ranked in that year
fka: Formerly known as

6-3 2017 LeadingAge Ziegler 150

Additional Listings: Multi-site Senior Living Providers

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

Rank	2017 LZ 150 Rank	System Name	State	Units (as of 12/31/16)				
				Total	ILU	ALU	NCB	AFF
76	56	Holland Home	MI	1,434	723	450	261	0
77	65	Wesley Enhanced Living	PA	1,397	629	246	360	162
78	74	Lutheran SeniorLife	PA	1,394	491	192	442	269
79	104	The New Jewish Home fka Jewish Home Lifecare	NY	1,388	24	0	814	550
80	NR	Oklahoma City Housing Authority	OK	1,386	0	0	0	1,386
81	NR	Catholic Charities of Chicago	IL	1,372	0	0	0	1,372
82	Next 50	Wesley Woods Senior Living	GA	1,367	361	93	23	890
83	133	Genacross Lutheran Services fka Lutheran Homes Society	OH	1,357	142	171	393	651
84	58	Baptist Village Communities	OK	1,349	783	241	325	0
85	NR	Victory Housing	MD	1,347	0	0	0	1,347
86	68	SpiriTrust Lutheran	PA	1,325	553	321	344	107
87	80	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	1,324	88	684	252	300
88	59	Buckner Retirement Services, Inc.	TX	1,322	723	273	326	0
89	62	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	0
90	83	Methodist Retirement Communities	TX	1,292	432	288	253	319
91	69	American Baptist Homes of the Midwest	MN	1,290	374	209	617	90
92	64	Lutheran Services Carolinas, Inc.	NC	1,276	257	254	732	33
93	63	Masonicare	CT	1,264	458	277	529	0
94	NR	New Samaritan Corporation	CT	1,251	0	0	0	1,251
95	66	Friendship Senior Options	IL	1,229	755	183	291	0
96	67	Virginia United Methodist Homes, Inc.	VA	1,226	513	433	280	0
97	NR	Menorah Housing Foundation	CA	1,221	0	0	0	1,221
98	146	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	1,218	334	135	183	566
99	85	United Church Homes and Services	NC	1,208	538	90	328	252
100	118	Lutheran Social Ministries of New Jersey, Inc.	NJ	1,207	281	150	348	428

NR: Not ranked in that year
fka: Formerly known as

LZ 150 Charts

Chapter 3

The Rankings

3-1a-e The Nation's Largest Not-for-profit Multi-site Senior Living Organizations.....	16
a. Ranked by Total Senior Living Units (Primary Ranking)	16
b. Ranked by Independent Living Units	22
c. Ranked by Assisted Living Units	28
d. Ranked by Nursing Care Beds.....	34
e. The Next 50.....	40
3-2a-b Change at a Glance.....	41
a. Greatest Changes in Units	41
b. Greatest Changes in Rank	41

Chapter 4

Analysis of the Data

4-1a-h Units	50
a. Rank, Detailed by Units (2016 vs. 2015).....	50
b. Summary of Unit Mix (by Largest 10, 25, 50, 100 & 150).....	56
c. Percentage of Total Units Owned (by Largest 10, 25, 50, 100).....	57
d. Total Unit Mix by Year, by Total Units 2000 Through 2016 for 2017 LZ 150.....	58
e. Total Unit Mix by Year, by Percent 2000 Through 2016 for 2017 LZ 150.....	59
f. Year Over Year Change in Percentage of Unit Mix 2000 Through 2016 for 2017 LZ 150.....	60
g. Percentage Change in Unit Mix 2000 Through 2016 for 2017 LZ 150.....	61
h. Unit Type Comparison, by Units 2000 Through 2016 for 2017 LZ 150.....	62

4-2a-h Communities	63
a. Rank, Detailed by Communities (2016 vs. 2015).....	63
b. Summary of Community Mix (by Largest 10, 25, 50, 100 & 150).....	69
c. Percentage of Total Communities Owned (by Largest 10, 25, 50 and s100)	70
d. Total Community Mix by Year, by Total Communities, 2000 through 2016.....	71
e. Total Community Mix by Year, by Percent, 2000 through 2016, for 2017 LZ 150.....	72
f. Total Community Mix by Year, by Percent, 2000 Through 2016, For 2017 LZ 150	
g. Year over Year Change in Percentage of Community Mix, for 2017 LZ 150	69
h. Community Type Comparison, by Community, 2000 through 2016, for 2017 LZ 150.....	74
4-3a-f Locations	76
a. Community Locations	76
b. Top Five States by Community Type.....	77
c. LPC Locations	78
d. IL Locations	79
e. AL Locations.....	80
f. NH Locations.....	81
4-4a-c System Headquarters	82
a. States With Largest Number of Headquarters' Locations.....	82
b. Headquarters' Locations.....	83
4-5a-b Metropolitan Statistical Areas	84
a. Number of Headquarters Located in the Largest 30 MSAs.....	84
b. Number of Communities Located in the Largest 30 MSAs by Type.....	85

4-6a-b Geographic Classifications	86	4-15a-c Affordable Housing.....	104
a. Primary Classifications	86	a. LZ 150 Providers of Housing, Ranked by Total Affordable Housing Units.....	104
b. Primary Classifications by largest, 10, 25, 50, 100 & 150.....	87	b. Comparison of Market-rate vs. Affordable Units of Housing Providers.....	106
4-7 Corporate Name Changes	88	c. Percentage of LZ 150 Providing Housing	106
4-8a-b Debt Ratings.....	89	4-16a-c Managed Units & Communities	107
a. LZ 150 with Rated Debt.....	89	a. LZ 150 Providers That Manage, Ranked by Managed-only Units	107
b. Ratings by Category	90	b. Comparison of Owned vs. Managed Communities and Units of Providers That Manage	108
4-9a-c Revenues	91	c. Percentage of LZ 150 That Manage.....	119
a-b. Average Revenue by Organization FYI 2016.....	91	4-17a-c Assisted and Skilled Composition.....	110
c. Average Revenue for HCBS.....	94	a. Percentage of Private vs. Semi-Private Units.....	110
4-10a-d Corporate Structure.....	94	b. Percentage of LZ 150 that offer Memory Care.....	111
a. 2017 LZ 150 Corporate Level Positions, by Area and Reporting Executive.....	94	c. Type of Memory Support Offered	112
b. LZ 150 Change in Corporate Staffing, by Area	95	4-18a-c Home and Community-Based Services	113
c. LZ 150 Corporate Staffing Changes.....	96	a. Percentage of LZ 150 That Offer HCBS to Non-Residents.....	113
d. Corporate Tenure	96	b. LZ 150 Offering: CCaH, Hospice, PACE.....	114
4-11a-b Accreditation	97	c. LZ 150 Providers with \$10 Million + in HCBS Revenue	115
a. LZ 150 With Accredited	97	4-19a-c Technology.....	116
b. LZ 150 With at Least One Accredited Community...	98	a. Electronic Documentation Technologies	116
4-12a-b Staffing.....	99	b. Safety Monitoring Technologies.....	117
a. Average Number of Employees, 2005-2016	99	c. Health & Wellness Monitoring Technologies.....	118
b. Summary of Employees, 2010-2016.....	100	4-20a-c Joint Ventures.....	119
4-13a Rental Life Plan Communities	101	a. LZ 150 Engaged in a Joint Venture	119
a. LZ 150 Organizations With LPC Rental IL	101	b. Type of Joint Venture.....	119
4-14a-d Affiliations	102	c. ACOs, Bundled Payments	120
a. Affiliation by Total Number of Systems.....	102		
b. Affiliation by Total Number of Units	102		
c. Faith-based Affiliations, by Total Number of Systems.....	103		
d. Faith-based Affiliations, by Total Units	103		

Chapter 5

Growth

5-1a-e Rate of Growth for Largest 10 Systems.....	123
a. From 1900 (Excludes Evangelical Lutheran Good Samaritan Society)	124
b. From 1950 (Excludes Evangelical Lutheran Good Samaritan Society)	125
c. From 1980 (Excludes Evangelical Lutheran Good Samaritan Society)	126
d. From 1990 (Excludes Evangelical Lutheran Good Samaritan Society)	127
e. From 2000 (Excludes Evangelical Lutheran Good Samaritan Society)	128
f. From 2005 (Excludes Evangelical Lutheran Good Samaritan Society)	129
5-2a-r Pace of Growth.....	130
a. National Senior Campuses (MD).....	130
b. Acts Retirement-Life Communities (PA)	131
c. Presbyterian Home & Services (MN).....	132
d. Covenant Retirement Communities (IL)	133
e. Retirement Housing Foundation (CA)	134
f. Cornerstone (CA)	135
g. Lifespace Communities, Inc. (IA)	136
h. The Kendal Corporation (PA).....	137
i. Lutheran Senior Services (MO).....	138
j. Presbyterian Senior Living (PA)	139
k. Asbury Communities (MD).....	140
l. Westminster Communities of Florida (FL)	141
m. Ohio Living (OH)	142
n. Pacific Retirement Services (OR)	143
o. Front Porch Communities and Services (CA).....	144
p. Volunteers of America (VA)	145
q. Masonic Villages (PA)	146
r. Diakon Lutheran Social Ministries (PA).....	147
5-3a-c Aggregate Growth.....	148
a. Organizations by Aggregate Growth, by Period.....	148
b. Organizations by Growth in Units, by Period	149
c. Organizations by Aggregate Growth for the “Largest Systems” (over 2000 units).....	150
5-4 Size by Year Founded	151
5-5a-b Future Growth Plans	152
a. Percentage Planning to Expand or Reposition in Next Two years.....	152
b. Percentage Planning to Grow Through Development or Affiliation.....	153
5-6a-c Type of Growth by Organizations.....	154
a. Number of Organizations Changing, by Growth Type, 1980 through 2016.....	154
b. Number of Organizations Changing, by Growth Type, 1990 through 2016.....	155
c. Number of Organizations Changing, by Growth Type, 2000 through 2016.....	156
5-7a-j Type of Growth by Communities	157
a. Cumulative Growth of Largest 10 Systems	157
b. Incremental Growth of Largest 10 Systems.....	158
c. Cumulative Growth of Largest 25 Systems	159
d. Incremental Growth of Largest 25 Systems.....	160
e. Cumulative Growth of Largest 50 Systems	161
f. Incremental Growth of Largest 50 Systems.....	162
g. Cumulative Growth of Largest 100 Systems	163
h. Incremental Growth of Largest 100 Systems.....	164
i. Cumulative Growth of Largest 150 Systems	165
j. Incremental Growth of Largest 150 Systems.....	166
5-8a-b Expansions	167
a. Historical Growth	167
b. Historical Growth	168

- 5-9a-c New Communities.....169**
 - a. Historical Growth 169
 - b. 2015 Community Openings 170
 - c. 2015 Locations..... 171
- 5-10a-c Mergers/Acquisitions/Affiliations167**
 - a. Historical Growth 172
 - b. 2015 Mergers/Acquisitions/Affiliations..... 173
 - c. 2015 Locations..... 174
- 5-11a-c Dispositions.....175**
 - a. Historical Growth 175
 - b. 2015 Community Closures or Dispositions..... 176
 - c. 2015 Locations..... 177

Chapter 6

Additional Listings

- 6-1a-c Single-Campus Senior Living Communities...181**
 - a. The Nation’s Largest Not-for-Profit Single-Campus Senior Living 181
 - b. Single-Campus Providers of HCBS..... 185
 - c. Technology Adoption: Single-Campus Providers... 186
 - d. Largest Individual Campuses 188
- 6-2 Affordable Housing Providers (Largest).....191**
- 6-3 Multi-Site Senior Living Providers (Ranked by Total Market-Rate and Affordable Senior Living Units).....195**

In closing, the largest not-for-profit senior living organizations continue to grow and evolve with the changing landscape. This year, we had a number of single-site providers grow into multi-site organizations and join the LZ 150 primary rankings. We continue to see that for today’s not-for-profits, growth is primarily being driven through community expansions and affiliations. Providers remain committed to home and community-based service platforms and the largest providers of those services continue to grow their annual revenue obtained from these services. Technology adoption will continue to be tracked as providers maintain existing platforms and explore investments into emerging solutions. It is our hope that this publication fully captures the behaviors and patterns of today’s not-for-profit senior living providers and serves to enhance awareness among providers, business firms, associations, and other related partners.

2017 LeadingAge 150 Ziegler



Ziegler

CAPITAL :: INVESTMENTS :: ADVICE