

2015 LeadingAge 150 Ziegler



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

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

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Raising the Bar

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

Produced by:



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

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

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

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

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

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The 2015 LeadingAge Ziegler 150 confirms, once again, the significant role that LeadingAge member not-for-profit organizations play in the aging services field. This LeadingAge Ziegler report, like the 11 editions preceding it, presents a snapshot of the longstanding story of our members' enlightened leadership, transformation and good works. By telling their stories, these organizations are engaged in shared learning – sharing their experiences and strategies with the entire field. At the same time, they are helping to increase public understanding of our sector of long-term services and supports.

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

In 2015, LeadingAge members are addressing complex challenges creatively. Their governing boards and senior leaders are engaging in effective strategic planning to reposition, grow, change, partner, innovate and venture into new service possibilities responsibly.

While the LeadingAge Ziegler 150 is not designed to be a qualitative report, behind each of the organizations ranked within this publication, nevertheless, is a story of governance and leadership committed to quality services and long-term success. The LZ 150 paints a picture of a vital part of America's aging services continuum that continues to be a driver of enlightened leadership, change and commitment to expanding the world of possibilities for aging.

LeadingAge is pleased to partner with our friends at Ziegler to bring you the LeadingAge Ziegler 150, 12th edition.

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

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



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

To answer these and a host of other questions, Ziegler began its research more than a decade ago. Just as all multi-site senior living organizations have been, at their inception, a single-site, so this listing began with one senior living provider. We were analyzing how quickly and by what methods one of our clients, a multi-site

organization, had grown. It became clear that a comprehensive study of the not-for-profit universe of senior living system providers would have enormous value for those interested in understanding senior living and the largest senior living providers.

This year, the publication's 12th annual release, continues the second year of the expanded list of the 150 largest not-for-profit providers in the country. Collectively, the country's 150 largest not-for-profit senior living providers represent over 236,000 units throughout the country. That is a significant service to this country's senior population, and it has been a privilege tracking the growth of the sector over the past 12 years.

Because LeadingAge's membership is exclusively not-for-profit senior living providers, LeadingAge has been the ideal partner for this research initiative. With each successive year of data, new trends and patterns emerge that should be of interest to those evaluating change in their own organizations. We look forward to the ongoing development of the LeadingAge Ziegler 150 ("LZ 150") and the opportunity to enhance this tool even further to assist the not-for-profit senior living provider not only to survive, but thrive.

Daniel J. Hermann
Senior Managing Director, Head of Investment Banking
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LeadingAge 150 Ziegler

The LeadingAge Ziegler 150 Objective

Both LeadingAge and Ziegler are nationally recognized organizations serving the growing aging services field. The LeadingAge Ziegler 150 (“LZ 150”) began through the desire of these two organizations to examine and understand the not-for-profit senior living sector. Our goal is to present current data that illustrate the size of the not-for-profit segment of the senior living sector, creating an awareness of the characteristics of growing systems and overall trends of system growth. With the help of the LZ 150, we hope to further the understanding and delivery of successful senior living.

The 2015 LeadingAge Ziegler 150 lists the largest not-for-profit systems providing aging services through senior living in the United States, by order of their total owned market-rate units, as of **December 31, 2014**.

LeadingAge 150 Ziegler

Chapter 1

Understanding the LeadingAge Ziegler 150

Importance of Not-for-Profits

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

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

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

The LZ 150 Development

The LZ 150 has been produced by two expert organizations in senior care: LeadingAge, the nation's largest association of not-for-profit aging services providers in the country, and Ziegler, the nation's #1 ranked underwriter of tax-exempt and not-for-profit financings in the United States for senior living¹. Joining together to prepare and present the data, LeadingAge and Ziegler founded the LeadingAge Ziegler 100, which evolved into the LeadingAge Ziegler 150 with the 2014 report. The combined expertise of LeadingAge and Ziegler yields a reliable, useful and valuable source of information.

The LeadingAge Ziegler 150 (LZ 150)

The genesis of the LZ 150 research was to quench a thirst for answers related to the growth of not-for-profit systems. Ziegler had compiled extensive, but primarily anecdotal, information about not-for-profit senior living, gleaned through its experience in working with specific organizations. While useful, this information did not represent the not-for-profit senior living sector as a whole. Ziegler had a host of questions it wished to answer for itself, for its clients and for those interested in investing in the senior living sector, such as who are the largest senior living providers in the nation, how quickly are systems growing, and what trends are taking place with the type of growth.

By assembling and presenting the combined data and knowledge of LeadingAge and Ziegler, the LZ 150 publication answers many of these questions. From its inception, the creation of the LZ 150 was an innovative move for those involved with not-for-profit senior living. To our knowledge, listing the largest not-for-profit senior living systems by the number of units they own and operate, representing the number of residents they serve, rather than by their financial success, created a new way of ordering systems, providing a fresh perspective on what was previously understood as a known market. The journey in creating and updating the LZ 150 annually has provided a wealth of data by which to understand and analyze the characteristics of senior living system providers' growth and change.

The organizations in the LZ 150 have made strategic decisions over the years, sometimes to grow and expand to serve a broader community, sometimes to dispose of communities and reposition a portfolio of properties and markets served. The LZ 150 is only the beginning of a profile of providers who are delivering services to the elderly community, both residential and home-based. Thousands of not-for-profit providers are playing an important role in the United States. We embrace each organization's contribution to the populations it serves. Not-for-profits are strong in numbers and bound by shared values, no matter the size of the organization.

¹ 2014 ranking data and amounts provided by Thomson Reuters as of 12/31/14.

Chapter 2

The Largest 150

A Quantitative Listing

LeadingAge and Ziegler are not the first to develop a listing of organizations or companies. Many common listings include qualitative factors, such as “best” or “worst” or “most successful.” Other listings are based on quantitative, objective measures alone. Following the footsteps of other well-known listings, the LZ 150 also uses a quantitative means of listing. The LZ 150 lists not-for-profit multi-site organizations based on the total number of senior living units (excluding government-subsidized [affordable] units) that each system owns and operates. The **Primary Ranking** is ranked by size—based on total units—carrying no qualitative value judgment in the ranking. Size does not connote quality, nor does it connote financial strength. Both LeadingAge and Ziegler want users of the data to see the LZ 150 as a statement of fact, not as an endorsement.

Methodology

Defining a Multi-site Organization

For the purposes of the LZ 150 listing and analyses, a multi-site organization, or system, has been defined as a **LeadingAge-member not-for-profit organization that owns and operates senior living on more than one campus**. While it is understood that systems may also manage units they do not own, these managed, non-owned units are subject to frequent change and so are not included in the total unit count compiled in the LZ 150 **Primary Ranking**. However, as before, we offer an examination of the extent to which the LZ 150 organizations manage units they do not own. (Chapter 4: Organizational Characteristics)

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

It should be noted that two types of systems have been intentionally excluded from the LZ 150 listing: (i) systems that are composed primarily of government-subsidized (affordable) housing and (ii) systems that are composed primarily of acute or post-acute services or health care systems. Additional rankings of affordable housing providers are included in Chapter 6 of the report.

Compiling the Listing

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

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

Data used for ranking the 2015 LZ 150 were provided and confirmed (“confirmation”) by 135 of the 150 organizations. Twenty-five (25) confirmations were received from the “next 50,” the organizations ranked from 151 to 200.

Although the information used for the compilation of the LZ 150 was provided in the vast majority of cases by the organizations themselves, some organizations cannot trace their histories to the degree of accuracy desired for the LZ 150 analyses. In such cases, historical information has been extrapolated and the current information validated. For some analyses where detail was unavailable, unit mix in prior years with uncertain histories was approximated based on the most recent current mix data. The LZ 150's listing can be tabulated by any one of the

variables tracked for the systems. Again, in no way should readers construe the ranking in any of the categories as a measure of quality or value.

Key Findings

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

- **An understanding of size ...** The systems range from 18,122 units to 560 units.
- **Information on unit mix ...** The 10 largest providers of senior living represent approximately 32% of the total number of units for all systems in LZ 150.
- **An appreciation of the rate of growth ...** In the last 10 years the average annual growth rate in total units is 2.1%, 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 79% of the LZ 150 offering specialized memory care units.
- **Insights into type of growth ...** The LZ 150 have grown primarily through expansion, with the number of units via new campus growth having slowed in the past few years since the economic recession. The majority of growth in recent years has been from within existing campuses. At the same time, organizations continue to dispose of dated nursing homes or financially stressed communities. 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). Roughly 57% of the LZ 150 offer some type of home and community-based services to non-residents. Gaining in popularity is the CCaH model, which is now offered by nearly 13% of the LZ 150.
- **A glimpse of the geography ...** The systems provide market-rate senior living in 44 states. The state in the LZ 100 with the highest number of system headquarters is Pennsylvania. Minnesota has the largest total number of communities, with 168 communities across the largest 150 systems.
- **Technology ...** On average, roughly 77% of the communities owned by the LZ 150 use electronic point of care/point of service documentation systems. A similar percentage, 75.3%, use electronic health/medical records. Adoption is generally lower for health and wellness technologies, such as medication monitoring or telehealth remote monitoring.
- **Joint ventures and partnerships ...** Roughly one-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 up from the 24% reported in the 2014 report. One-third 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.

LeadingAge 150 Ziegler

Chapter 3

Rankings

The LZ 150 Not-for-profit Multi-site Senior Living Organization Rankings

As in other presentations of this sort, data can be ‘cut and sliced’ across a variety of time periods, one year, five years, 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 change on an annual basis. Therefore, the **Primary Ranking** (Chart 3-1a) of the LZ 150 is by total senior living units with the 2015 and 2014 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 2015 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations.

The 2015 Rank. The 2015 Rank column displays the numerical ranking of each system according to its 12/31/14 data within the LZ 150 for each of the four listings: by Total Senior Living Units, i.e. the **Primary Ranking** (Chart 3-1a), by Total Independent Living Units (Chart 3-1b), by Total Assisted Living Units (Chart 3-1c) and by Total Nursing Care Beds (Chart 3-1d). An organization’s ranking in each respective listing may change depending on the composition of its unit mix, that is, the mix of independent living units to assisted living units to nursing units within its system of communities.

The 2014 Rank. The 2014 Rank shows the numerical ranking of the listed organization in last year’s publication (according to its 12/31/13 data) listing of the same type. The organizations that show “NR” (Not Ranked) in their ranking were not included in the LZ 150 rankings for 2014. Also note that with the increase to the largest 150 in the 2014 publication, the “next 25” connotes a different meaning than in previous years. The “next 50” in the current publication represent organizations ranked 151 through 200 as of 12/31/2014.

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 12/31/14). The systems listed in the 2015 LZ 150 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/14. Managed communities that are not owned will be discussed later in the publication (Chapter 4) and are not included in the total community count compiled in the LZ 150 **Primary Ranking**. Government-subsidized (affordable housing) units are also excluded from this count, but are presented for each of the LZ 150 organizations in subsequent listings (Chapter 6).

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

Independent living units (ILU). Independent living units may be composed of apartments, duplexes, triplexes, quadplexes or single-family homes. Typically, residents in independent living units pay a combination of a monthly fee and one-time entrance fee to live in the unit. (Note: some residents own these units, but this type of equity model represents a very small number of the independent living units within the LZ 150.) Those who pay a monthly fee will usually receive services such as housekeeping, maintenance, dining, security, lawn maintenance and other services.

Assisted living units (ALU). Assisted living bridges the gap between independent living and nursing home care. Trained employees provide supportive care to residents who are unable to live independently and require assistance with activities of daily living (ADLs), including management of medications, bathing, dressing, toileting, ambulating and eating. Personal Care or Residential Care Units (PCU/RCU) are included in the overall ALU total for LZ 150 organizations. These units share similarities with ALUs but are not licensed as such.

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

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

Communities (as of 12/31/14). Over the years a number of terms have been used to describe a senior living property: site, location, facility, campus, community. A high rise on a limited acreage parcel doesn’t fit the term “campus”. A scattering of buildings, offering various levels of care, across extended acreage doesn’t fit the term “facility”. We believe the best all-encompassing word to use is “community”. The communities examined are continuing care retirement communities (CCRC), independent living communities (IL), assisted living communities (AL), and nursing homes (NH). It is important to note that a single CCRC may include ILU (independent

living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will generally contain at least independent living and nursing care.² The CCRC's resident payment plans may include entrance fee, condo/co-op and/or rental programs. Generally the majority of the CCRC's units are not NCB. The systems listed in the LZ 150 are ranked by totaling the communities owned by the system in these four key areas: CCRCs, IL, AL and NH.

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

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

3-1 2015 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

2015 Rank	2014 Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	2	National Senior Campuses	MD	18,122	15,503	1,270	1,349	15	15	0	0	0
2	1	Evangelical Lutheran Good Samaritan Society	SD	18,048	5,032	2,262	10,754	170	71	7	8	84
3	3	ACTS Retirement-Life Communities	PA	7,993	5,652	904	1,437	23	23	0	0	0
4	4	Presbyterian Homes and Services	MN	6,867	3,332	2,077	1,458	38	12	21	2	3
5	5	Covenant Retirement Communities, Inc.	IL	4,865	3,098	818	949	15	13	1	1	0
6	6	Retirement Housing Foundation	CA	4,098	2,642	861	595	18	9	8	1	0
7	7	Lifespace Communities, Inc.	IA	4,069	3,086	154	829	12	12	0	0	0
8	8	The Kendal Corporation	PA	3,732	2,522	649	561	15	13	2	0	0
9	9	Lutheran Senior Services	MO	3,406	1,665	752	989	11	9	0	1	1
10	10	Westminster Communities of Florida	FL	3,253	2,031	471	751	9	9	0	0	0
11	11	Presbyterian Senior Living	PA	3,120	1,503	498	1,119	20	12	6	2	0
12	13	Cornerstone Affiliates	CA	3,097	1,858	557	682	11	11	0	0	0
13	19	Ecumen	MN	3,023	290	2,106	627	36	0	4	24	8
14	12	Ohio Presbyterian Retirement Services	OH	3,010	1,516	617	877	12	12	0	0	0
15	15	Pacific Retirement Services	OR	2,826	2,086	333	407	9	8	1	0	0
16	14	Front Porch Communities and Services	CA	2,823	1,838	447	538	10	5	5	0	0
17	16	Asbury Communities	MD	2,774	1,941	335	498	5	5	0	0	0
18	18	Presbyterian Manors of Mid-America, Inc.	KS	2,415	837	591	987	18	16	0	1	1
19	22	Diakon Lutheran Social Ministries	PA	2,407	903	535	969	9	9	0	0	0
20	20	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,366	1,436	861	69	5	3	1	1	0
21	21	Volunteers of America	VA	2,335	480	707	1,148	24	4	3	7	10
22	17	Christian Homes, Inc.	IL	2,167	387	306	1,474	13	11	0	1	1
23	23	Shell Point	FL	2,049	1,332	389	328	2	2	0	0	0
24	24	Willow Valley Communities	PA	2,033	1,536	222	275	3	3	0	0	0
25	25	Springpoint Senior Living, Inc.	NJ	1,967	1,429	271	267	6	6	0	0	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 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

2015 Rank	2014 Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	26	Franciscan Communities, Inc.	IL	1,944	736	433	775	8	4	1	3	0
27	27	Augustana Care	MN	1,901	0	1,120	781	18	0	0	12	6
28	31	Concordia Lutheran Ministries	PA	1,873	554	965	354	11	5	0	6	0
29	30	Senior Quality Lifestyles Corporation	TX	1,858	1,130	419	309	6	6	0	0	0
30	34	National Church Residences	OH	1,855	778	535	542	10	5	2	2	1
31	28	Otterbein Senior Lifestyle Choices	OH	1,811	722	382	707	11	5	0	0	6
32	29	Christian Care Companies	AZ	1,789	1,434	289	66	4	1	3	0	0
33	36	Elim Care, Inc.	MN	1,728	197	451	1,080	24	0	4	9	11
34	33	Homewood Retirement Centers	MD	1,694	965	278	451	5	4	1	0	0
35	38	Providence Life Services	IL	1,603	665	360	578	9	1	4	1	3
36	35	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
37	42	Buckner Retirement Services, Inc.	TX	1,585	857	372	356	7	5	2	0	0
38	32	Jewish Home Lifecare	NY	1,585	24	0	1,561	4	0	1	0	3
39	37	Eskaton	CA	1,562	531	605	426	13	1	3	6	3
40	39	Episcopal Senior Communities	CA	1,550	1,054	120	376	6	6	0	0	0
41	40	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
42	41	Loretto	NY	1,475	259	593	623	8	1	2	4	1
43	50	Bethesda Senior Living Communities	CO	1,467	155	1,312	0	19	0	2	17	0
44	43	Presbyterian Homes	IL	1,445	855	225	365	5	3	1	1	0
45	44	Mississippi Methodist Senior Services, Inc.	MS	1,442	807	315	320	12	2	8	0	2
46	45	WesleyLife	IA	1,431	692	301	438	7	7	0	0	0
47	46	Holland Home	MI	1,419	723	435	261	4	3	0	0	1
48	48	Greencroft Communities	IN	1,409	520	390	499	6	6	0	0	0
49	49	Bethesda Health Group, Inc.	MO	1,375	555	18	802	7	1	4	0	2
50	51	be.group	CA	1,352	854	267	231	7	6	0	1	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 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

2015 Rank	2014 Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	73	Wesley Enhanced Living	PA	1,322	829	193	300	6	4	1	1	0
52	53	Baptist Village Communities	OK	1,280	774	181	325	8	3	5	0	0
53	54	Lutheran Life Ministries (fka Lutheran Life Communities)	IL	1,271	233	291	747	5	5	0	0	0
54	55	Masonicare, Inc.	CT	1,264	458	277	529	8	1	3	2	2
55	56	Lutheran Services Carolinas	NC	1,262	257	273	732	9	1	1	1	6
56	52	Presbyterian Villages of Michigan	MI	1,253	836	239	178	8	2	6	0	0
57	58	SantaFe Senior Living	FL	1,231	876	255	100	3	3	0	0	0
58	60	Virginia United Methodist Homes, Inc.	VA	1,231	515	435	281	7	6	0	1	0
59	59	Phoebe Ministries	PA	1,230	374	175	681	4	4	0	0	0
60	57	Friendship Senior Options	IL	1,213	783	182	248	2	2	0	0	0
61	62	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
62	61	Virginia Baptist Homes	VA	1,192	748	225	219	4	4	0	0	0
63	64	Integrace (fka EMA)	MD	1,150	645	228	277	4	3	0	1	0
64	65	Lutheran Social Services of South Central Pennsylvania	PA	1,149	554	251	344	6	6	0	0	0
65	66	Presbyterian SeniorCare	PA	1,114	348	351	415	3	3	0	0	0
66	80	United Methodist Memorial Home	IN	1,110	249	513	348	3	3	0	0	0
67	63	Lutheran SeniorLife	PA	1,106	472	192	442	7	2	5	0	0
68	69	United Methodist Homes	NY	1,057	390	241	426	4	3	0	1	0
69	70	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
70	71	Lutheran Homes of South Carolina	SC	1,029	405	308	316	5	5	0	0	0
71	72	United Methodist Homes of New Jersey	NJ	1,026	88	686	252	5	1	0	4	0
72	74	Elant	NY	995	148	144	703	6	1	0	1	4
73	75	Blue Skies of Texas (fka Air Force Villages)	TX	986	730	129	127	2	2	0	0	0
74	76	United Church Homes, Inc.	OH	969	177	145	647	6	4	0	0	2
75	77	Presby's Inspired Life	PA	960	493	207	260	4	2	0	1	1

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 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

2015 Rank	2014 Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	78	The Presbyterian Homes, Inc.	NC	956	634	133	189	3	3	0	0	0
77	79	United Church Homes and Services	NC	951	533	90	328	3	3	0	0	0
78	68	Northern California Presbyterian Homes and Services, Inc.	CA	949	706	102	141	5	3	1	1	0
79	81	The United Methodist Retirement Homes, Inc.	NC	933	626	105	202	3	3	0	0	0
80	82	Menno Haven	PA	920	531	177	212	3	2	1	0	0
81	85	Liberty Lutheran Services	PA	893	384	301	208	4	3	0	1	0
82	86	VMP	WI	889	447	205	237	2	2	0	0	0
83	88	Westminster Ingleside Retirement Communities	DC	885	607	113	165	3	3	0	0	0
84	87	Oakwood Lutheran Senior Ministries	WI	885	588	160	137	2	2	0	0	0
85	110	Eventide	MN	882	73	326	483	6	3	0	2	1
86	89	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
88	92	Presbyterian Communities of South Carolina	SC	852	270	316	266	5	5	0	0	0
87	91	Living Branches	PA	852	463	246	143	3	2	0	1	0
89	90	Presbyterian Communities and Services	TX	843	329	134	380	2	2	0	0	0
90	130	Christian Care Communities, Inc.	KY	839	185	186	468	5	1	3	1	0
91	93	Simpson Senior Services	PA	839	494	153	192	3	3	0	0	0
92	94	Goodwin House Incorporated	VA	831	583	248	0	2	2	0	0	0
93	95	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
94	97	LutherCare	PA	811	474	126	211	3	2	0	0	1
95	98	Givens Estates	NC	809	588	77	144	2	2	0	0	0
96	134	Heritage Ministries	NY	806	247	139	420	9	1	3	2	3
97	84	Cedar Community	WI	796	322	241	233	6	1	2	2	1
98	102	BHI Senior Living, Inc.	IN	795	155	415	225	3	3	0	0	0
99	101	Western Home Communities	IA	790	420	238	132	3	1	1	1	0
100	111	The Ohio Masonic Home	OH	781	338	249	194	3	2	1	0	0

NR indicates that organization was not among largest 150 in the 2014 report



3-1 2015 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

2015 Rank	2014 Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
101	99	Morningside Ministries	TX	772	318	134	320	3	3	0	0	0
102	103	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
103	105	Lutheran Social Services of Michigan	MI	765	289	120	356	5	1	2	0	2
104	100	Sunnyside Presbyterian Home, Inc.	VA	763	501	128	134	3	3	0	0	0
105	107	Life Enriching Communities	OH	762	467	136	159	2	2	0	0	0
106	104	Methodist Retirement Communities	TX	761	318	229	214	4	4	0	0	0
107	108	Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
108	106	Christian Care Senior Living Communities (fka Christian Care Centers)	TX	747	386	138	223	3	3	0	0	0
109	NR	Sun Health Senior Living, LLC	AZ	746	565	31	150	3	3	0	0	0
110	109	Christian Living Ventures (fka Christian Living Communities)	CO	744	414	152	178	3	3	0	0	0
111	83	Mather LifeWays	IL	741	624	46	71	3	2	1	0	0
112	115	Landis Communities	PA	736	489	144	103	3	1	1	0	1
113	112	Wellspring Lutheran Services	MI	736	128	224	384	10	1	3	2	4
114	113	Luther Manor	WI	732	366	156	210	2	1	0	1	0
115	NR	Wesley Willows	IL	706	445	170	91	2	1	1	0	0
116	116	Lutheran Homes Society	OH	702	141	172	389	5	2	1	0	2
117	117	Saint Therese	MN	693	302	69	322	3	2	0	1	0
118	Nxt Nxt 25	Episcopal SeniorLife Communities	NY	690	377	131	182	7	0	4	2	1
119	118	Wesley Homes	WA	688	453	87	148	2	2	0	0	0
120	Nxt Nxt 25	St. Andrew's Resources for Seniors System	MO	684	337	164	183	5	2	1	1	1
121	122	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
122	120	Masonic Homes of Kentucky	KY	680	302	125	253	3	1	1	1	0
123	121	Messiah Lifeways	PA	678	337	157	184	2	1	1	0	0
124	123	Lutheran Social Ministries of New Jersey	NJ	678	281	130	267	2	1	0	0	1
125	119	Lutheran Life Villages	IN	678	154	115	409	3	1	0	0	2

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 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

2015 Rank	2014 Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
126	125	Vincentian Collaborative System	PA	675	66	82	527	4	2	0	0	2
127	137	Presbyterian Retirement Communities Northwest	WA	673	479	132	62	4	3	1	0	0
128	129	National Lutheran Communities & Services	MD	668	396	102	170	3	2	0	1	0
129	124	Maple Knoll Communities, Inc.	OH	661	364	90	207	2	2	0	0	0
130	126	LifeStream Complete Senior Living, Inc.	AZ	661	357	144	160	8	0	3	3	2
131	127	United Methodist Homes	CT	659	90	406	163	4	1	0	3	0
132	131	LindenGrove, Inc.	WI	650	0	189	461	9	0	0	5	4
133	133	The Loomis Communities	MA	634	427	73	134	4	4	0	0	0
134	96	Sunset Retirement Communities and Services	MI	634	304	200	130	4	1	1	1	1
135	Next 25	Deaconess Abundant Life Communities	MA	625	377	165	83	5	3	1	1	0
136	145	Porter Hills	MI	622	356	116	150	3	1	1	1	0
137	135	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
138	136	Smith Senior Living	IL	615	325	144	146	2	2	0	0	0
139	138	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
140	139	Lutheran Social Services of the South, Inc.	TX	586	339	149	98	4	2	1	1	0
141	144	St. John's Lutheran Ministries	MT	586	144	256	186	4	3	0	1	0
142	140	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
143	142	Baptist Homes Society	PA	580	257	134	189	2	1	0	1	0
144	143	Friends Homes, Inc.	NC	577	368	100	109	2	2	0	0	0
145	146	United Methodist Retirement Communities, Inc.	MI	575	280	210	85	3	2	1	0	0
146	114	Albright Care Services	PA	575	266	85	224	2	2	0	0	0
147	147	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
148	148	Baptist Life Communities	KY	560	218	75	267	4	1	2	0	1
149	NR	Bethany Lutheran Homes	WI	560	170	267	123	9	1	1	6	1
150	150	Life Care Pastoral Services	FL	550	384	76	90	2	2	0	0	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

2015 IL Rank	2014 IL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	National Senior Campuses	MD	18,122	15,503	1,270	1,349	15	15	0	0	0
2	2	ACTS Retirement-Life Communities	PA	7,993	5,652	904	1,437	23	23	0	0	0
3	3	Evangelical Lutheran Good Samaritan Society	SD	18,048	5,032	2,262	10,754	170	71	7	8	84
4	4	Presbyterian Homes and Services	MN	6,867	3,332	2,077	1,458	38	12	21	2	3
5	5	Covenant Retirement Communities, Inc.	IL	4,865	3,098	818	949	15	13	1	1	0
6	6	Lifespace Communities, Inc.	IA	4,069	3,086	154	829	12	12	0	0	0
7	7	Retirement Housing Foundation	CA	4,098	2,642	861	595	18	9	8	1	0
8	8	The Kendal Corporation	PA	3,732	2,522	649	561	15	13	2	0	0
9	10	Pacific Retirement Services	OR	2,826	2,086	333	407	9	8	1	0	0
10	9	Westminster Communities of Florida	FL	3,253	2,031	471	751	9	9	0	0	0
11	11	Asbury Communities	MD	2,774	1,941	335	498	5	5	0	0	0
12	13	Cornerstone Affiliates	CA	3,097	1,858	557	682	11	11	0	0	0
13	12	Front Porch Communities and Services	CA	2,823	1,838	447	538	10	5	5	0	0
14	14	Lutheran Senior Services	MO	3,406	1,665	752	989	11	9	0	1	1
15	16	Willow Valley Communities	PA	2,033	1,536	222	275	3	3	0	0	0
16	15	Ohio Presbyterian Retirement Services	OH	3,010	1,516	617	877	12	12	0	0	0
17	19	Presbyterian Senior Living	PA	3,120	1,503	498	1,119	20	12	6	2	0
18	20	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,366	1,436	861	69	5	3	1	1	0
19	18	Christian Care Companies	AZ	1,789	1,434	289	66	4	1	3	0	0
20	17	Springpoint Senior Living, Inc.	NJ	1,967	1,429	271	267	6	6	0	0	0
21	21	Shell Point	FL	2,049	1,332	389	328	2	2	0	0	0
22	22	Senior Quality Lifestyles Corporation	TX	1,858	1,130	419	309	6	6	0	0	0
23	23	Episcopal Senior Communities	CA	1,550	1,054	120	376	6	6	0	0	0
24	25	Homewood Retirement Centers	MD	1,694	965	278	451	5	4	1	0	0
25	24	Diakon Lutheran Social Ministries	PA	2,407	903	535	969	9	9	0	0	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2015 IL Rank	2014 IL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	27	SantaFe Senior Living	FL	1,231	876	255	100	3	3	0	0	0
27	30	Buckner Retirement Services, Inc.	TX	1,585	857	372	356	7	5	2	0	0
28	28	Presbyterian Homes	IL	1,445	855	225	365	5	3	1	1	0
29	29	be.group	CA	1,352	854	267	231	7	6	0	1	0
30	31	Presbyterian Manors of Mid-America, Inc.	KS	2,415	837	591	987	18	16	0	1	1
31	26	Presbyterian Villages of Michigan	MI	1,253	836	239	178	8	2	6	0	0
32	65	Wesley Enhanced Living	PA	1,322	829	193	300	6	4	1	1	0
33	33	Mississippi Methodist Senior Services, Inc.	MS	1,442	807	315	320	12	2	8	0	2
34	34	Friendship Senior Options	IL	1,213	783	182	248	2	2	0	0	0
35	49	National Church Residences	OH	1,855	778	535	542	10	5	2	2	1
36	35	Baptist Village Communities	OK	1,280	774	181	325	8	3	5	0	0
37	36	Virginia Baptist Homes	VA	1,192	748	225	219	4	4	0	0	0
38	37	Franciscan Communities, Inc.	IL	1,944	736	433	775	8	4	1	3	0
39	39	Blue Skies of Texas	TX	986	730	129	127	2	2	0	0	0
40	40	Holland Home	MI	1,419	723	435	261	4	3	0	0	1
41	38	Otterbein Senior Lifestyle Choices	OH	1,811	722	382	707	11	5	0	0	6
42	32	Northern California Presbyterian Homes and Services, Inc.	CA	949	706	102	141	5	3	1	1	0
43	41	WesleyLife	IA	1,431	692	301	438	7	7	0	0	0
44	42	Providence Life Services	IL	1,603	665	360	578	9	1	4	1	3
45	43	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
46	44	Integrace	MD	1,150	645	228	277	4	3	0	1	0
47	45	The Presbyterian Homes, Inc.	NC	956	634	133	189	3	3	0	0	0
48	46	The United Methodist Retirement Homes, Inc.	NC	933	626	105	202	3	3	0	0	0
49	47	Mather LifeWays	IL	741	624	46	71	3	2	1	0	0
50	48	Westminster Ingleside Retirement Communities	DC	885	607	113	165	3	3	0	0	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2015 IL Rank	2014 IL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	50	Oakwood Lutheran Senior Ministries	WI	885	588	160	137	2	2	0	0	0
52	52	Givens Estates	NC	809	588	77	144	2	2	0	0	0
53	51	Goodwin House Incorporated	VA	831	583	248	0	2	2	0	0	0
54	NR	Sun Health Senior Living, LLC	AZ	746	565	31	150	3	3	0	0	0
55	55	Bethesda Health Group, Inc.	MO	1,375	555	18	802	7	1	4	0	2
56	53	Concordia Lutheran Ministries	PA	1,873	554	965	354	11	5	0	6	0
57	54	Lutheran Social Services of South Central Pennsylvania	PA	1,149	554	251	344	6	6	0	0	0
58	57	Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
59	60	United Church Homes and Services	NC	951	533	90	328	3	3	0	0	0
60	58	Eskaton	CA	1,562	531	605	426	13	1	3	6	3
61	59	Menno Haven	PA	920	531	177	212	3	2	1	0	0
62	62	Greencroft Communities	IN	1,409	520	390	499	6	6	0	0	0
63	63	Virginia United Methodist Homes, Inc.	VA	1,231	515	435	281	7	6	0	1	0
64	64	Sunnyside Presbyterian Home, Inc.	VA	763	501	128	134	3	3	0	0	0
65	66	Simpson Senior Services	PA	839	494	153	192	3	3	0	0	0
66	67	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
67	68	Presby's Inspired Life	PA	960	493	207	260	4	2	0	1	1
68	73	Landis Communities	PA	736	489	144	103	3	1	1	0	1
69	71	Volunteers of America	VA	2,335	480	707	1,148	24	4	3	7	10
70	84	Presbyterian Retirement Communities Northwest	WA	673	479	132	62	4	3	1	0	0
71	72	LutherCare	PA	811	474	126	211	3	2	0	0	1
72	70	Lutheran SeniorLife	PA	1,106	472	192	442	7	2	5	0	0
73	76	Life Enriching Communities	OH	762	467	136	159	2	2	0	0	0
74	74	Living Branches	PA	852	463	246	143	3	2	0	1	0
75	75	Masonicare, Inc.	CT	1,264	458	277	529	8	1	3	2	2

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2015 IL Rank	2014 IL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	77	Wesley Homes	WA	688	453	87	148	2	2	0	0	0
77	78	VMP	WI	889	447	205	237	2	2	0	0	0
78	NR	Wesley Willows	IL	706	445	170	91	2	1	1	0	0
79	79	The Loomis Communities	MA	634	427	73	134	4	4	0	0	0
80	90	Western Home Communities	IA	790	420	238	132	3	1	1	1	0
81	81	Christian Living Ventures	CO	744	414	152	178	3	3	0	0	0
82	86	Lutheran Homes of South Carolina	SC	1,029	405	308	316	5	5	0	0	0
83	83	National Lutheran Communities & Services	MD	668	396	102	170	3	2	0	1	0
84	85	United Methodist Homes	NY	1,057	390	241	426	4	3	0	1	0
85	56	Christian Homes, Inc.	IL	2,167	387	306	1,474	13	11	0	1	1
86	87	Christian Care Senior Living Communities	TX	747	386	138	223	3	3	0	0	0
87	88	Liberty Lutheran Services	PA	893	384	301	208	4	3	0	1	0
88	89	Life Care Pastoral Services	FL	550	384	76	90	2	2	0	0	0
89	91	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
90	NR	Episcopal SeniorLife Communities	NY	690	377	131	182	7	0	4	2	1
91	NR	Deaconess Abundant Life Communities	MA	625	377	165	83	5	3	1	1	0
92	92	Phoebe Ministries	PA	1,230	374	175	681	4	4	0	0	0
93	93	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
94	95	Friends Homes, Inc.	NC	577	368	100	109	2	2	0	0	0
95	96	Luther Manor	WI	732	366	156	210	2	1	0	1	0
96	94	Maple Knoll Communities, Inc.	OH	661	364	90	207	2	2	0	0	0
97	97	LifeStream Complete Senior Living, Inc.	AZ	661	357	144	160	8	0	3	3	2
98	98	Porter Hills	MI	622	356	116	150	3	1	1	1	0
99	99	Presbyterian SeniorCare	PA	1,114	348	351	415	3	3	0	0	0
100	101	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1

NR indicates that organization was not among largest 150 in the 2014 report



3-1 2015 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2015 IL Rank	2014 IL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
101	103	Lutheran Social Services of the South, Inc.	TX	586	339	149	98	4	2	1	1	0
102	100	The Ohio Masonic Home	OH	781	338	249	194	3	2	1	0	0
103	NR	St. Andrew's Resources for Seniors System	MO	684	337	164	183	5	2	1	1	1
104	102	Messiah Lifeways	PA	678	337	157	184	2	1	1	0	0
105	104	Presbyterian Communities and Services	TX	843	329	134	380	2	2	0	0	0
106	105	Smith Senior Living	IL	615	325	144	146	2	2	0	0	0
107	80	Cedar Community	WI	796	322	241	233	6	1	2	2	1
108	106	Morningside Ministries	TX	772	318	134	320	3	3	0	0	0
109	107	Methodist Retirement Communities	TX	761	318	229	214	4	4	0	0	0
110	69	Sunset Retirement Communities and Services	MI	634	304	200	130	4	1	1	1	1
111	108	Saint Therese	MN	693	302	69	322	3	2	0	1	0
112	109	Masonic Homes of Kentucky	KY	680	302	125	253	3	1	1	1	0
113	110	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
114	111	Ecumen	MN	3,023	290	2,106	627	36	0	4	24	8
115	112	Lutheran Social Services of Michigan	MI	765	289	120	356	5	1	2	0	2
116	113	Lutheran Social Ministries of New Jersey	NJ	678	281	130	267	2	1	0	0	1
117	114	United Methodist Retirement Communities, Inc.	MI	575	280	210	85	3	2	1	0	0
118	115	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
119	116	Presbyterian Communities of South Carolina	SC	852	270	316	266	5	5	0	0	0
120	118	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
121	117	Albright Care Services	PA	575	266	85	224	2	2	0	0	0
122	119	Loretto	NY	1,475	259	593	623	8	1	2	4	1
123	120	Lutheran Services Carolinas	NC	1,262	257	273	732	9	1	1	1	6
124	121	Baptist Homes Society	PA	580	257	134	189	2	1	0	1	0
125	127	United Methodist Memorial Home	IN	1,110	249	513	348	3	3	0	0	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

3-1b RANKED BY INDEPENDENT LIVING UNITS

2015 IL Rank	2014 IL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
126	130	Heritage Ministries	NY	806	247	139	420	9	1	3	2	3
127	122	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
128	123	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
129	124	Lutheran Life Ministries	IL	1,271	233	291	747	5	5	0	0	0
130	125	Baptist Life Communities	KY	560	218	75	267	4	1	2	0	1
131	132	Elim Care, Inc.	MN	1,728	197	451	1,080	24	0	4	9	11
132	128	Christian Care Communities, Inc.	KY	839	185	186	468	5	1	3	1	0
133	140	United Church Homes, Inc.	OH	969	177	145	647	6	4	0	0	2
134	NR	Bethany Lutheran Homes	WI	560	170	267	123	9	1	1	6	1
135	131	Bethesda Senior Living Communities	CO	1,467	155	1,312	0	19	0	2	17	0
136	136	BHI Senior Living, Inc.	IN	795	155	415	225	3	3	0	0	0
137	133	Lutheran Life Villages	IN	678	154	115	409	3	1	0	0	2
138	134	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
139	135	Elant	NY	995	148	144	703	6	1	0	1	4
140	137	St. John's Lutheran Ministries	MT	586	144	256	186	4	3	0	1	0
141	138	Lutheran Homes Society	OH	702	141	172	389	5	2	1	0	2
142	139	Wellspring Lutheran Services	MI	736	128	224	384	10	1	3	2	4
143	142	United Methodist Homes	CT	659	90	406	163	4	1	0	3	0
144	143	United Methodist Homes of New Jersey	NJ	1,026	88	686	252	5	1	0	4	0
145	144	Eventide	MN	882	73	326	483	6	3	0	2	1
146	145	Vincentian Collaborative System	PA	675	66	82	527	4	2	0	0	2
147	147	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
148	148	Jewish Home Lifecare	NY	1,585	24	0	1,561	4	0	1	0	3
149	149	Augustana Care	MN	1,901	0	1,120	781	18	0	0	12	6
150	150	LindenGrove, Inc.	WI	650	0	189	461	9	0	0	5	4

NR indicates that organization was not among largest 150 in the 2014 report



3-1 2015 LeadingAge Ziegler 150

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

3-1c RANKED BY ASSISTED LIVING UNITS

2015 AL Rank	2014 AL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,048	5,032	2,262	10,754	170	71	7	8	84
2	3	Ecumen	MN	3,023	290	2,106	627	36	0	4	24	8
3	2	Presbyterian Homes and Services	MN	6,867	3,332	2,077	1458	38	12	21	2	3
4	4	Bethesda Senior Living Communities	CO	1,467	155	1,312	0	19	0	2	17	0
5	5	National Senior Campuses	MD	18,122	15,503	1,270	1,349	15	15	0	0	0
6	6	Augustana Care	MN	1,901	0	1,120	781	18	0	0	12	6
7	8	Concordia Lutheran Ministries	PA	1,873	554	965	354	11	5	0	6	0
8	7	ACTS Retirement-Life Communities	PA	7,993	5,652	904	1,437	23	23	0	0	0
9	9	Retirement Housing Foundation	CA	4,098	2,642	861	595	18	9	8	1	0
10	58	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,366	1,436	861	69	5	3	1	1	0
11	10	Covenant Retirement Communities, Inc.	IL	4,865	3,098	818	949	15	13	1	1	0
12	11	Lutheran Senior Services	MO	3,406	1,665	752	989	11	9	0	1	1
13	12	Volunteers of America	VA	2,335	480	707	1,148	24	4	3	7	10
14	13	United Methodist Homes of New Jersey	NJ	1,026	88	686	252	5	1	0	4	0
15	14	The Kendal Corporation	PA	3,732	2,522	649	561	15	13	2	0	0
16	17	Ohio Presbyterian Retirement Services	OH	3,010	1,516	617	877	12	12	0	0	0
17	15	Eskaton	CA	1,562	531	605	426	13	1	3	6	3
18	16	Loretto	NY	1,475	259	593	623	8	1	2	4	1
19	18	Presbyterian Manors of Mid-America, Inc.	KS	2,415	837	591	987	18	16	0	1	1
20	35	Cornerstone Affiliates	CA	3,097	1,858	557	682	11	11	0	0	0
21	20	Diakon Lutheran Social Ministries	PA	2,407	903	535	969	9	9	0	0	0
22	22	National Church Residences	OH	1,855	778	535	542	10	5	2	2	1
23	23	United Methodist Memorial Home	IN	1,110	249	513	348	3	3	0	0	0
24	19	Presbyterian Senior Living	PA	3,120	1,503	498	1,119	20	12	6	2	0
25	24	Westminster Communities of Florida	FL	3,253	2,031	471	751	9	9	0	0	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

2015 AL Rank	2014 AL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	26	Elim Care, Inc.	MN	1,728	197	451	1,080	24	0	4	9	11
27	21	Front Porch Communities and Services	CA	2,823	1,838	447	538	10	5	5	0	0
29	27	Virginia United Methodist Homes, Inc.	VA	1,231	515	435	281	7	6	0	1	0
28	25	Holland Home	MI	1,419	723	435	261	4	3	0	0	1
30	33	Franciscan Communities, Inc.	IL	1,944	736	433	775	8	4	1	3	0
31	28	Senior Quality Lifestyles Corporation	TX	1,858	1,130	419	309	6	6	0	0	0
32	31	BHI Senior Living, Inc.	IN	795	155	415	225	3	3	0	0	0
33	29	United Methodist Homes	CT	659	90	406	163	4	1	0	3	0
34	32	Greencroft Communities	IN	1,409	520	390	499	6	6	0	0	0
35	34	Shell Point	FL	2,049	1,332	389	328	2	2	0	0	0
36	38	Otterbein Senior Lifestyle Choices	OH	1,811	722	382	707	11	5	0	0	6
37	63	Buckner Retirement Services, Inc.	TX	1,585	857	372	356	7	5	2	0	0
38	36	Providence Life Services	IL	1,603	665	360	578	9	1	4	1	3
39	37	Presbyterian SeniorCare	PA	1,114	348	351	415	3	3	0	0	0
40	41	Asbury Communities	MD	2,774	1,941	335	498	5	5	0	0	0
41	40	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
42	39	Pacific Retirement Services	OR	2,826	2,086	333	407	9	8	1	0	0
43	57	Eventide	MN	882	73	326	483	6	3	0	2	1
44	44	Presbyterian Communities of South Carolina	SC	852	270	316	266	5	5	0	0	0
45	43	Mississippi Methodist Senior Services, Inc.	MS	1,442	807	315	320	12	2	8	0	2
46	42	Lutheran Homes of South Carolina	SC	1,029	405	308	316	5	5	0	0	0
47	50	Christian Homes, Inc.	IL	2,167	387	306	1,474	13	11	0	1	1
48	46	WesleyLife	IA	1,431	692	301	438	7	7	0	0	0
49	45	Liberty Lutheran Services	PA	893	384	301	208	4	3	0	1	0
50	47	Lutheran Life Ministries	IL	1,271	233	291	747	5	5	0	0	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

3-1c RANKED BY ASSISTED LIVING UNITS

2015 AL Rank	2014 AL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	49	Christian Care Companies	AZ	1,789	1,434	289	66	4	1	3	0	0
52	52	Homewood Retirement Centers	MD	1,694	965	278	451	5	4	1	0	0
53	54	Masonicare, Inc.	CT	1,264	458	277	529	8	1	3	2	2
54	53	Lutheran Services Carolinas	NC	1,262	257	273	732	9	1	1	1	6
56	55	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
55	51	Springpoint Senior Living, Inc.	NJ	1,967	1,429	271	267	6	6	0	0	0
57	56	be.group	CA	1,352	854	267	231	7	6	0	1	0
58	NR	Bethany Lutheran Homes	WI	560	170	267	123	9	1	1	6	1
59	62	St. John's Lutheran Ministries	MT	586	144	256	186	4	3	0	1	0
60	59	SantaFe Senior Living	FL	1,231	876	255	100	3	3	0	0	0
61	60	Lutheran Social Services of South Central Pennsylvania	PA	1,149	554	251	344	6	6	0	0	0
62	81	The Ohio Masonic Home	OH	781	338	249	194	3	2	1	0	0
63	132	Goodwin House Incorporated	VA	831	583	248	0	2	2	0	0	0
64	61	Living Branches	PA	852	463	246	143	3	2	0	1	0
65	64	United Methodist Homes	NY	1,057	390	241	426	4	3	0	1	0
66	65	Cedar Community	WI	796	322	241	233	6	1	2	2	1
67	66	Presbyterian Villages of Michigan	MI	1,253	836	239	178	8	2	6	0	0
68	48	Western Home Communities	IA	790	420	238	132	3	1	1	1	0
69	68	Methodist Retirement Communities	TX	761	318	229	214	4	4	0	0	0
70	69	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
71	70	Integrace	MD	1,150	645	228	277	4	3	0	1	0
72	72	Presbyterian Homes	IL	1,445	855	225	365	5	3	1	1	0
73	71	Virginia Baptist Homes	VA	1,192	748	225	219	4	4	0	0	0
74	73	Wellspring Lutheran Services	MI	736	128	224	384	10	1	3	2	4
75	75	Willow Valley Communities	PA	2,033	1,536	222	275	3	3	0	0	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

2015 AL Rank	2014 AL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	82	United Methodist Retirement Communities, Inc.	MI	575	280	210	85	3	2	1	0	0
77	77	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
78	76	Presby's Inspired Life	PA	960	493	207	260	4	2	0	1	1
79	78	VMP	WI	889	447	205	237	2	2	0	0	0
80	80	Sunset Retirement Communities and Services	MI	634	304	200	130	4	1	1	1	1
81	74	Wesley Enhanced Living	PA	1,322	829	193	300	6	4	1	1	0
82	67	Lutheran SeniorLife	PA	1,106	472	192	442	7	2	5	0	0
83	83	LindenGrove, Inc.	WI	650	0	189	461	9	0	0	5	4
84	149	Christian Care Communities, Inc.	KY	839	185	186	468	5	1	3	1	0
85	84	Friendship Senior Options	IL	1,213	783	182	248	2	2	0	0	0
86	85	Baptist Village Communities	OK	1,280	774	181	325	8	3	5	0	0
87	86	Menno Haven	PA	920	531	177	212	3	2	1	0	0
88	87	Phoebe Ministries	PA	1,230	374	175	681	4	4	0	0	0
89	88	Lutheran Homes Society	OH	702	141	172	389	5	2	1	0	2
90	NR	Wesley Willows	IL	706	445	170	91	2	1	1	0	0
91	90	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
92	NR	Deaconess Abundant Life Communities	MA	625	377	165	83	5	3	1	1	0
93	NR	St. Andrew's Resources for Seniors System	MO	684	337	164	183	5	2	1	1	1
94	91	Oakwood Lutheran Senior Ministries	WI	885	588	160	137	2	2	0	0	0
95	92	Messiah Lifeways	PA	678	337	157	184	2	1	1	0	0
96	93	Luther Manor	WI	732	366	156	210	2	1	0	1	0
97	94	Lifespace Communities, Inc.	IA	4,069	3,086	154	829	12	12	0	0	0
98	95	Simpson Senior Services	PA	839	494	153	192	3	3	0	0	0
99	96	Christian Living Ventures	CO	744	414	152	178	3	3	0	0	0
100	97	Lutheran Social Services of the South, Inc.	TX	586	339	149	98	4	2	1	1	0

NR indicates that organization was not among largest 150 in the 2014 report



3-1 2015 LeadingAge Ziegler 150

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

3-1c RANKED BY ASSISTED LIVING UNITS

2015 AL Rank	2014 AL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
101	79	United Church Homes, Inc.	OH	969	177	145	647	6	4	0	0	2
102	99	LifeStream Complete Senior Living, Inc.	AZ	661	357	144	160	8	0	3	3	2
103	101	Elant	NY	995	148	144	703	6	1	0	1	4
104	100	Smith Senior Living	IL	615	325	144	146	2	2	0	0	0
105	98	Landis Communities	PA	736	489	144	103	3	1	1	0	1
106	102	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
107	104	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
108	146	Heritage Ministries	NY	806	247	139	420	9	1	3	2	3
109	106	Christian Care Senior Living Communities (fka Christian Care Centers)	TX	747	386	138	223	3	3	0	0	0
110	111	Life Enriching Communities	OH	762	467	136	159	2	2	0	0	0
111	109	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
112	105	Presbyterian Communities and Services	TX	843	329	134	380	2	2	0	0	0
113	108	Morningside Ministries	TX	772	318	134	320	3	3	0	0	0
114	112	Baptist Homes Society	PA	580	257	134	189	2	1	0	1	0
115	113	The Presbyterian Homes, Inc.	NC	956	634	133	189	3	3	0	0	0
116	114	Presbyterian Retirement Communities Northwest	WA	673	479	132	62	4	3	1	0	0
117	NR	Episcopal SeniorLife Communities	NY	690	377	131	182	7	0	4	2	1
118	115	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
119	117	Blue Skies of Texas	TX	986	730	129	127	2	2	0	0	0
120	116	Lutheran Social Ministries of New Jersey	NJ	678	281	130	267	2	1	0	0	1
121	103	Sunnyside Presbyterian Home, Inc.	VA	763	501	128	134	3	3	0	0	0
122	119	LutherCare	PA	811	474	126	211	3	2	0	0	1
123	121	Masonic Homes of Kentucky	KY	680	302	125	253	3	1	1	1	0
124	123	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
125	131	Episcopal Senior Communities	CA	1,550	1,054	120	376	6	6	0	0	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

2015 AL Rank	2014 AL Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
126	125	Lutheran Social Services of Michigan	MI	765	289	120	356	5	1	2	0	2
127	127	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
128	128	Porter Hills	MI	622	356	116	150	3	1	1	1	0
129	118	Lutheran Life Villages	IN	678	154	115	409	3	1	0	0	2
130	122	Westminster Ingleside Retirement Communities	DC	885	607	113	165	3	3	0	0	0
131	129	The United Methodist Retirement Homes, Inc.	NC	933	626	105	202	3	3	0	0	0
132	124	Northern California Presbyterian Homes and Services, Inc.	CA	949	706	102	141	5	3	1	1	0
133	134	National Lutheran Communities & Services	MD	668	396	102	170	3	2	0	1	0
134	130	Friends Homes, Inc.	NC	577	368	100	109	2	2	0	0	0
135	143	United Church Homes and Services	NC	951	533	90	328	3	3	0	0	0
136	133	Maple Knoll Communities, Inc.	OH	661	364	90	207	2	2	0	0	0
137	135	Wesley Homes	WA	688	453	87	148	2	2	0	0	0
138	136	Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
139	89	Albright Care Services	PA	575	266	85	224	2	2	0	0	0
140	137	Vincentian Collaborative System	PA	675	66	82	527	4	2	0	0	2
141	138	Givens Estates	NC	809	588	77	144	2	2	0	0	0
142	139	Life Care Pastoral Services	FL	550	384	76	90	2	2	0	0	0
143	141	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
144	142	Baptist Life Communities	KY	560	218	75	267	4	1	2	0	1
145	144	The Loomis Communities	MA	634	427	73	134	4	4	0	0	0
146	145	Saint Therese	MN	693	302	69	322	3	2	0	1	0
147	147	Mather LifeWays	IL	741	624	46	71	3	2	1	0	0
148	NR	Sun Health Senior Living, LLC	AZ	746	565	31	150	3	3	0	0	0
149	148	Bethesda Health Group, Inc.	MO	1,375	555	18	802	7	1	4	0	2
150	150	Jewish Home Lifecare	NY	1,585	24	0	1,561	4	0	1	0	3

NR indicates that organization was not among largest 150 in the 2014 report



3-1 2015 LeadingAge Ziegler 150

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

3-1d RANKED BY NURSING CARE BEDS

2015 NCB Rank	2014 NCB Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,048	5,032	2,262	10,754	170	71	7	8	84
2	3	Jewish Home Lifecare	NY	1,585	24	0	1,561	4	0	1	0	3
3	2	Christian Homes, Inc.	IL	2,167	387	306	1,474	13	11	0	1	1
4	5	Presbyterian Homes and Services	MN	6,867	3,332	2,077	1,458	38	12	21	2	3
5	4	ACTS Retirement-Life Communities	PA	7,993	5,652	904	1,437	23	23	0	0	0
6	6	National Senior Campuses	MD	18,122	15,503	1,270	1,349	15	15	0	0	0
7	9	Volunteers of America	VA	2,335	480	707	1,148	24	4	3	7	10
8	7	Presbyterian Senior Living	PA	3,120	1,503	498	1,119	20	12	6	2	0
9	10	Elim Care, Inc.	MN	1,728	197	451	1,080	24	0	4	9	11
10	12	Lutheran Senior Services	MO	3,406	1,665	752	989	11	9	0	1	1
11	11	Presbyterian Manors of Mid-America, Inc.	KS	2,415	837	591	987	18	16	0	1	1
12	15	Diakon Lutheran Social Ministries	PA	2,407	903	535	969	9	9	0	0	0
13	14	Covenant Retirement Communities, Inc.	IL	4,865	3,098	818	949	15	13	1	1	0
14	20	Ohio Presbyterian Retirement Services	OH	3,010	1,516	617	877	12	12	0	0	0
15	16	Lifespace Communities, Inc.	IA	4,069	3,086	154	829	12	12	0	0	0
16	17	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
17	18	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
18	19	Bethesda Health Group, Inc.	MO	1,375	555	18	802	7	1	4	0	2
19	21	Augustana Care	MN	1,901	0	1,120	781	18	0	0	12	6
20	22	Franciscan Communities, Inc.	IL	1,944	736	433	775	8	4	1	3	0
21	23	Westminster Communities of Florida	FL	3,253	2,031	471	751	9	9	0	0	0
22	24	Lutheran Life Ministries	IL	1,271	233	291	747	5	5	0	0	0
23	25	Lutheran Services Carolinas	NC	1,037	51	254	732	9	1	1	1	6
24	26	Otterbein Senior Lifestyle Choices	OH	1,811	722	382	707	11	5	0	0	6
25	27	Elant	NY	995	148	144	703	6	1	0	1	4

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

2015 NCB Rank	2014 NCB Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	13	Cornerstone Affiliates	CA	3,097	1,858	557	682	11	11	0	0	0
27	30	Phoebe Ministries	PA	1,230	374	175	681	4	4	0	0	0
28	29	United Church Homes, Inc.	OH	969	177	145	647	6	4	0	0	2
29	31	Ecumen	MN	3,023	290	2,106	627	36	0	4	24	8
30	32	Loretto	NY	1,475	259	593	623	8	1	2	4	1
31	33	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
32	34	Retirement Housing Foundation	CA	4,098	2,642	861	595	18	9	8	1	0
33	40	Providence Life Services	IL	1,603	665	360	578	9	1	4	1	3
34	35	The Kendal Corporation	PA	3,732	2,522	649	561	15	13	2	0	0
35	37	National Church Residences	OH	1,855	778	535	542	10	5	2	2	1
36	36	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
37	38	Front Porch Communities and Services	CA	2,823	1,838	447	538	10	5	5	0	0
38	39	Masonicare, Inc.	CT	1,264	458	277	529	8	1	3	2	2
39	41	Vincentian Collaborative System	PA	675	66	82	527	4	2	0	0	2
40	42	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
41	43	Greencroft Communities	IN	1,409	520	390	499	6	6	0	0	0
42	44	Asbury Communities	MD	2,774	1,941	335	498	5	5	0	0	0
43	55	Eventide	MN	882	73	326	483	6	3	0	2	1
44	45	Christian Care Communities, Inc.	KY	839	185	186	468	5	1	3	1	0
45	46	LindenGrove, Inc.	WI	650	0	189	461	9	0	0	5	4
46	48	Homewood Retirement Centers	MD	1,694	965	278	451	5	4	1	0	0
47	47	Lutheran SeniorLife	PA	1,106	472	192	442	7	2	5	0	0
48	49	WesleyLife	IA	1,431	692	301	438	7	7	0	0	0
49	51	Eskaton	CA	1,562	531	605	426	13	1	3	6	3
50	52	United Methodist Homes	NY	1,057	390	241	426	4	3	0	1	0

NR indicates that organization was not among largest 150 in the 2014 report



3-1 2015 LeadingAge Ziegler 150

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

3-1d RANKED BY NURSING CARE BEDS

2015 NCB Rank	2014 NCB Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	56	Heritage Ministries	NY	806	247	139	420	9	1	3	2	3
52	53	Presbyterian SeniorCare	PA	1,114	348	351	415	3	3	0	0	0
53	54	Lutheran Life Villages	IN	678	154	115	409	3	1	0	0	2
54	58	Pacific Retirement Services	OR	2,826	2,086	333	407	9	8	1	0	0
55	57	Lutheran Homes Society	OH	702	141	172	389	5	2	1	0	2
56	60	Wellspring Lutheran Services	MI	736	128	224	384	10	1	3	2	4
57	59	Presbyterian Communities and Services	TX	843	329	134	380	2	2	0	0	0
58	61	Episcopal Senior Communities	CA	1,550	1,054	120	376	6	6	0	0	0
59	62	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
60	63	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
61	64	Presbyterian Homes	IL	1,445	855	225	365	5	3	1	1	0
62	65	Buckner Retirement Services, Inc.	TX	1,585	857	372	356	7	5	2	0	0
63	66	Lutheran Social Services of Michigan	MI	765	289	120	356	5	1	2	0	2
64	78	Concordia Lutheran Ministries	PA	1,873	554	965	354	11	5	0	6	0
65	84	United Methodist Memorial Home	IN	1,110	249	513	348	3	3	0	0	0
66	69	Lutheran Social Services of South Central Pennsylvania	PA	1,149	554	251	344	6	6	0	0	0
67	71	Shell Point	FL	2,049	1,332	389	328	2	2	0	0	0
68	67	United Church Homes and Services	NC	951	533	90	328	3	3	0	0	0
69	72	Baptist Village Communities	OK	1,280	774	181	325	8	3	5	0	0
70	73	Saint Therese	MN	693	302	69	322	3	2	0	1	0
71	74	Mississippi Methodist Senior Services, Inc.	MS	1,442	807	315	320	12	2	8	0	2
72	68	Morningside Ministries	TX	772	318	134	320	3	3	0	0	0
73	75	Lutheran Homes of South Carolina	SC	1,029	405	308	316	5	5	0	0	0
74	76	Senior Quality Lifestyles Corporation	TX	1,858	1,130	419	309	6	6	0	0	0
75	77	Wesley Enhanced Living	PA	1,322	829	193	300	6	4	1	1	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

2015 NCB Rank	2014 NCB Rank	System Name	State	Units (as of 12/31/14)				Total	CCRC	IL	AL	NH
				Total	ILU	ALU	NCB					
76	81	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
77	85	Virginia United Methodist Homes, Inc.	VA	1,231	515	435	281	7	6	0	1	0
78	83	Integrace	MD	1,150	645	228	277	4	3	0	1	0
79	82	Willow Valley Communities	PA	2,033	1,536	222	275	3	3	0	0	0
80	90	Springpoint Senior Living, Inc.	NJ	1,967	1,429	271	267	6	6	0	0	0
81	86	Lutheran Social Ministries of New Jersey	NJ	678	281	130	267	2	1	0	0	1
82	87	Baptist Life Communities	KY	560	218	75	267	4	1	2	0	1
83	88	Presbyterian Communities of South Carolina	SC	852	270	316	266	5	5	0	0	0
84	94	Holland Home	MI	1,419	723	435	261	4	3	0	0	1
85	89	Presby's Inspired Life	PA	960	493	207	260	4	2	0	1	1
86	92	Masonic Homes of Kentucky	KY	620	220	147	253	3	1	1	1	0
87	93	United Methodist Homes of New Jersey	NJ	1,026	88	686	252	5	1	0	4	0
88	79	Friendship Senior Options	IL	1,213	783	182	248	2	2	0	0	0
89	95	VMP	WI	889	447	205	237	2	2	0	0	0
90	98	Cedar Community	WI	796	322	241	233	6	1	2	2	1
91	96	be.group	CA	1,352	854	267	231	7	6	0	1	0
92	100	BHI Senior Living, Inc.	IN	795	155	415	225	3	3	0	0	0
93	80	Albright Care Services	PA	575	266	85	224	2	2	0	0	0
94	99	Christian Care Senior Living Communities	TX	747	386	138	223	3	3	0	0	0
95	101	Virginia Baptist Homes	VA	1,192	748	225	219	4	4	0	0	0
96	103	Methodist Retirement Communities	TX	761	318	229	214	4	4	0	0	0
97	104	Menno Haven	PA	920	531	177	212	3	2	1	0	0
98	105	LutherCare	PA	811	474	126	211	3	2	0	0	1
99	106	Luther Manor	WI	732	366	156	210	2	1	0	1	0
100	107	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0

NR indicates that organization was not among largest 150 in the 2014 report



3-1 2015 LeadingAge Ziegler 150

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

3-1d RANKED BY NURSING CARE BEDS

2015 NCB Rank	2014 NCB Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
101	108	Liberty Lutheran Services	PA	893	384	301	208	4	3	0	1	0
102	102	Maple Knoll Communities, Inc.	OH	661	364	90	207	2	2	0	0	0
103	109	The United Methodist Retirement Homes, Inc.	NC	933	626	105	202	3	3	0	0	0
104	110	The Ohio Masonic Home	OH	781	338	249	194	3	2	1	0	0
105	111	Simpson Senior Services	PA	839	494	153	192	3	3	0	0	0
106	112	Baptist Homes Society	PA	580	257	134	189	2	1	0	1	0
107	113	The Presbyterian Homes, Inc.	NC	956	634	133	189	3	3	0	0	0
108	114	St. John's Lutheran Ministries	MT	586	144	256	186	4	3	0	1	0
109	115	Messiah Lifeways	PA	678	337	157	184	2	1	1	0	0
110	NR	St. Andrew's Resources for Seniors System	MO	684	337	164	183	5	2	1	1	1
111	NR	Episcopal SeniorLife Communities	NY	690	377	131	182	7	0	4	2	1
112	117	Presbyterian Villages of Michigan	MI	955	525	252	178	8	2	6	0	0
113	116	Christian Living Ventures	CO	744	414	152	178	3	3	0	0	0
114	118	National Lutheran Communities & Services	MD	668	396	102	170	3	2	0	1	0
115	119	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
116	126	Westminster Ingleside Retirement Communities	DC	885	607	113	165	3	3	0	0	0
117	121	United Methodist Homes	CT	659	90	406	163	4	1	0	3	0
118	122	LifeStream Complete Senior Living, Inc.	AZ	661	357	144	160	8	0	3	3	2
119	123	Life Enriching Communities	OH	762	467	136	159	2	2	0	0	0
120	141	Porter Hills	MI	622	356	116	150	3	1	1	1	0
121	NR	Sun Health Senior Living, LLC	AZ	746	565	31	150	3	3	0	0	0
122	125	Wesley Homes	WA	688	453	87	148	2	2	0	0	0
123	127	Smith Senior Living	IL	615	325	144	146	2	2	0	0	0
124	128	Givens Estates	NC	809	588	77	144	2	2	0	0	0
125	129	Living Branches	PA	852	463	246	143	3	2	0	1	0

NR indicates that organization was not among largest 150 in the 2014 report

3-1 2015 LeadingAge Ziegler 150

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

2015 NCB Rank	2014 NCB Rank	System Name	State	Units (as of 12/31/14)				Communities (as of 12/31/14)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
126	130	Northern California Presbyterian Homes and Services, Inc.	CA	949	706	102	141	5	3	1	1	0
127	131	Oakwood Lutheran Senior Ministries	WI	885	588	160	137	2	2	0	0	0
128	133	Sunnyside Presbyterian Home, Inc.	VA	763	501	128	134	3	3	0	0	0
129	134	The Loomis Communities	MA	634	427	73	134	4	4	0	0	0
130	143	Western Home Communities	IA	790	420	238	132	3	1	1	1	0
131	135	Sunset Retirement Communities and Services	MI	634	304	200	130	4	1	1	1	1
132	132	Blue Skies of Texas	TX	986	730	129	127	2	2	0	0	0
133	136	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
134	NR	Bethany Lutheran Homes	WI	560	170	267	123	9	1	1	6	1
135	137	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
136	138	Garden Spot Village	PA	747	542	86	119	2	1	0	0	1
137	139	Friends Homes, Inc.	NC	577	368	100	109	2	2	0	0	0
138	140	Landis Communities	PA	736	489	144	103	3	1	1	0	1
139	142	SantaFe Senior Living	FL	1,231	876	255	100	3	3	0	0	0
140	144	Lutheran Social Services of the South, Inc.	TX	586	339	149	98	4	2	1	1	0
141	NR	Wesley Willows	IL	706	445	170	91	2	1	1	0	0
142	145	Life Care Pastoral Services	FL	550	384	76	90	2	2	0	0	0
143	146	United Methodist Retirement Communities, Inc.	MI	575	280	210	85	3	2	1	0	0
144	NR	Deaconess Abundant Life Communities	MA	625	377	165	83	5	3	1	1	0
145	97	Mather LifeWays	IL	741	624	46	71	3	2	1	0	0
146	28	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,366	1,436	861	69	5	3	1	1	0
147	148	Christian Care Companies	AZ	1,789	1,434	289	66	4	1	3	0	0
148	149	Presbyterian Retirement Communities Northwest	WA	673	479	132	62	4	3	1	0	0
149	150	Bethesda Senior Living Communities	CO	1,467	155	1,312	0	19	0	2	17	0
150	124	Goodwin House Incorporated	VA	831	583	248	0	2	2	0	0	0

NR indicates that organization was not among largest 150 in the 2014 report



3-1 2015 LeadingAge Ziegler 150

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

3-1e THE NEXT 50

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

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

First 25 (432 to 547 Total Units)

Allegheny Lutheran Social Ministries (PA)
 Asbury, Inc. (TN)
 Beechwood Continuing Care (NY)
 Cadbury Senior Services, Inc. (NJ)
 Church Homes Inc. (CT)
 Clark Retirement Community (MI)
 Elder Care Alliance (CA)
 Evangelical Homes of Michigan (MI)
 Judson Services Inc. (OH)
 Lutheran Living Services (WI)
 Masonic Pathways (MI)
 Medford Leas (NJ)
 Niagara Lutheran Health System (NY)
 Presbyterian Homes and Services (NY)
 Presbyterian Homes and Services of Kentucky (KY)
 Presbyterian Homes of Georgia, Inc. (GA)
 Redstone Highlands Senior Living Communities (PA)
 Rockwood Retirement Communities (WA)
 The Eliza Jennings Senior Care Network (OH)
 The Lutheran Home Association (MN)
 The RiverWoods Company (NH)
 United Methodist Services for the Aging (PA)
 Wesbury (PA)
 Wesleyan Senior Living (OH)
 Willow Brook Christian Communities (OH)

Second 25 (131 to 431 Total Units)

Appalachian Christian Village (TN)
 Bethesda Health & Housing (MN)
 Brazos Presbyterian Homes Inc. (TX)
 CJE SeniorLife (IL)
 Colonial Senior Services, Inc. (OH)
 Crest View Corporation (MN)
 Episcopal Communities & Services (CA)
 Episcopal Retirement Homes, Inc (OH)
 Good Shepherd Communities (NY)
 Homme, Inc. of Wisconsin (WI)
 Jewish Senior Life of Metropolitan Detroit (MI)
 Lincoln Lutheran (WI)
 Lutheran Homes of Oshkosh (WI)
 Lutheran Social Services of Central Ohio (OH)
 Lyngblomsten (MN)
 Presbyterian Homes in the Presbytery of Lake Erie (PA)
 Presbyterian Senior Care of WNY, Inc. (NY)
 Resthaven (MI)
 Skaalen Retirement Services (WI)
 South Carolina Baptist Ministries for the Aging (SC)
 The Glen Retirement System (LA)
 Three Pillars Senior Living Communities (WI)
 Valley View Haven, Inc. (PA)
 WRC Senior Services (PA)

3-2 2015 LeadingAge Ziegler 150

The Rankings: Change at a Glance

3-2a GREATEST CHANGES IN UNITS

Greatest Increase and Decrease	State	YE 2014 Units	YE 2013 Units	Change
Greatest Increase				
Ecumen	MN	3,023	2,371	+652
National Senior Campuses	MD	18,122	17,682	+440
Episcopal SeniorLife	NY	690	373	+317
St. Andrews Resources for Seniors	MO	684	373	+311
Wesley Enhanced Living	PA	1,322	1,022	300

Greatest Decrease				
Christian Homes	IL	2,167	2,508	-341
Evangelical Lutheran Good Samaritan Society	SD	18,048	18,286	-238
Sunset Retirement Communities and Services	MI	634	822	-188
Mather Lifeways	IL	741	900	-159
Albright Care Services	PA	575	723	-148
Northern California Presbyterian Homes & Services	CA	949	1,088	-139

3-2b GREATEST CHANGES IN RANK

Greatest Upward and Downward Change	State	2015 Rank	2014 Rank	Change
Greatest Upward Movement				
Episcopal SeniorLife	NY	118	Next Next 25	+58
St. Andrews Resources for Seniors	MO	120	Next Next 25	+56
Heritage Ministries	NY	96	134	+38
Eventide	MN	85	110	+25
Wesley Enhanced Living	PA	51	73	+22
Deaconness Abundant Living	MA	134	Next 25	+17
Greatest Downward Movement				
Mather LifeWays	IL	111	83	-28
Sunset Retirement Communities and Services	MI	133	96	-37
Albright Care Services	PA	146	114	-32

LeadingAge 150 Ziegler

Chapter 4

Analysis of the Data

The LeadingAge Ziegler 150 are examined through a number of categories: total units, total communities, geographic coverage, location, ratings, accreditation, number of employees, affiliations, founding dates, provision of government-subsidized (affordable) housing, and the provision of home and community-based services. This year's publication, like last year's, 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 2015 LZ 150 provides a side-by-side comparison of the unit mix for 2014 compared to 2013 for each of the organizations. The 2015 LZ 150 organizations own approximately 236,000 market-rate senior living units. By breaking the data into the largest 10, 25 and 50 (Chart 4-1c), one sees that the ratio of units held by the largest 50 compared with the percentage of total units in the LZ 150 is not balanced, e.g., the largest 50 systems hold nearly 65% of the total units. The 10 largest systems own 32% of the total LZ 150 units. The average system within the 2015 LZ 150 had nearly 1,600 units in 2014 (Chart 4-1b). Approximately 50% of the 2015 LZ 150's total communities are CCRCs, with the remaining nearly 50% fairly 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 of the systems. The first set of columns shows the unit mix as of 12/31/14. The second set of columns shows the unit mix as of 12/31/13.

Change in Total Units from 2013 to 2014. This column provides the change in the listed organization's TOTAL market-rate units (all levels of care) between year-end 2014 and year-end 2013.

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 2013 LZ 100 compared to the unit mix of the 2014 LZ 150, compared to the unit mix of the 2015 LZ 150). Charts 4-1d-h provide a more graphic illustration of the type of change occurring in the LZ 150. For all of the year-over-year comparisons made in 4.1b-4.1h, note that increase to 150 as part of the 2014 publication. In some instances, two figures are calculated for the current publication, one that reflects the largest 100 and allows for consistent

Communities

The unit analysis of the 2015 LZ 150 presented in Chart 4-1a is followed by a side-by-side comparison in Chart 4-2a of the community portfolios of the 2015 LZ 150 for 2014 compared to their portfolios at the end of 2013.

Summary of Not-for-profit Communities. Community, as noted earlier, is the term used to refer to any type of community owned by the LZ 150, whether stand-alone nursing home (NH), assisted living community (AL), independent living community (IL) or CCRC. Again, government-subsidized (affordable) housing properties are excluded from the count of communities shown for the LZ 150 (these properties are examined in Chapter 6). The first set of columns in Chart 4-2a shows the communities owned, by type, as of 12/31/14. The second set of columns shows the communities owned, by type, as of 12/31/13.

Change in Total Communities from 2013 to 2014. This column provides the change in the listed organization's TOTAL communities (all types, excluding affordable housing) between year-end 2013 and year-end 2014. 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 2013 LZ 100 compared to types of communities owned by the 2014 LZ 150, compared to the types of communities owned by the 2015 LZ 150). As with the year-over-year unit comparisons, in some instances, two figures are calculated for the current publication, one that reflects the largest 100 and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 150 listing.

System Headquarters

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

Metropolitan Statistical Areas (MSAs)

Metropolitan Statistical Areas (MSAs) are areas defined by the Office of Management and Budget (OMB) for purposes of tabulating statistics on clearly defined metropolitan boundaries. These boundaries are based on Census 2010 data and applied by preset rules. Areas are identified by county, with several counties making up a particular MSA. The National Investment Center for the Seniors Housing & Care Industries (NIC) has developed a database that provides a comprehensive tool for understanding supply and demand for the top 100 metropolitan statistical areas (MSAs) called the Market Area Profiles, or MAP™. The MAP™ data and analysis allow management staff of a multi-site access to data on operating performance in their MSAs as well as their defined local market. The locations of the communities owned by LZ 150 organizations in the largest 30 MSAs tracked by the MAP™ study are charted, showing the number and type of communities within each of the MSAs.

Classifications

A multi-site's geographic market area, what the LZ 150 listing terms its primary classification, offers a descriptive glimpse of the location of the multi-site's senior living properties. A multi-site's primary classification describes the market area that includes ALL of its properties, regardless of type (including government-subsidized senior living). For some, the market area may be established by implicit boundaries, due to regulatory constraints or even due to the system's own name. Some multi-sites may change their names, as we'll discuss further, to more accurately reflect new growth strategies.

The LZ 150 are classified by their primary markets according to eight categories. Definitions and examples of the eight market categories are listed below:

- **National.** Systems whose properties are located among multiple states in more than one region of the United States. A number of the national systems focus their operations either west of the Mississippi River or Rocky Mountains or east of the Mississippi. Few of the national systems have an abundance of properties broadly scattered across the country. Examples: Pacific Retirement Services, Inc. (LZ 150 #15) — a national system with a disparate geographic distribution of its communities; locations are primarily on the West Coast, with two communities in Wisconsin and one in Texas. Retirement Housing Foundation (LZ 150 #6) is a national system with communities in multiple states spread across the country.
- **Across States.** Systems whose communities are located among multiple states, primarily in one region of the United States. Example: Presbyterian Senior Living (LZ 150 #11) is classified as an across states system with a focus in the Mid-Atlantic U.S.
- **Tri-state.** Systems whose communities are located across three states, typically contiguous. Example: Elim Care (LZ 150 # 33) has communities located in Iowa, Minnesota and North Dakota.
- **Bi-state.** Systems whose communities are located across two states, typically contiguous. Example: Lutheran Life Ministries (LZ 150 #53) has communities currently operating in Illinois and Indiana. With the construction of a CCRC underway in Florida, Lutheran Life Ministries will expand to a tri-state organization.
- **Single State.** Systems whose communities are contained within a single state's borders and are spread across multiple regions of the state. Example: SantaFe Senior Living (LZ 150 #57)—multiple communities within Florida, spread across multiple regions of the state (from southeast Florida to north central Florida, east and west).
- **State Region.** Systems whose communities are contained within a single region within a single state's borders. Example: WesleyLife (LZ 150 #46)—multiple communities centrally concentrated in Iowa.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: Presby's Inspired Life (LZ 150 #75)—multiple communities throughout the greater Philadelphia, PA, area.

- **Sub-metropolitan.** Systems whose communities are contained within a sub-section of a metropolitan area, that is, they are concentrated in one section of a metropolitan area. The larger the metropolitan area, the more likely the possibility that a multi-site may emerge within a sub-metropolitan area. Example: The communities of Goodwin House Incorporated (LZ 150 #92) are located in the southwestern quadrant of the DC-Arlington metropolitan area.

Chart 4-6a shows that a large majority, 76%, 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 a single state, to a bi-state, to a tri-state, then across states to a national multi-site. For example, Augustana Care Corporation has operated in the Minneapolis area for most of its existence. In the 2000s it added communities in other areas of Minnesota. In 2011, it expanded outside of Minnesota, with the acquisition of a community in Colorado. National multi-sites are 8.7 percent of the LZ 150 and tend to be among the largest of the LZ 150 organizations, but as noted earlier, a smaller percentage of these national multi-sites have communities that are broadly spread across the country.

A multi-site may have a secondary market, as well. For example, bi-state multi-site Lutheran Senior Services (LZ 150 #9) has a secondary metropolitan market, with a concentration of communities in St. Louis. The secondary classification provides a snapshot of a system's geographic concentration of communities. Nearly 50 of the LZ 150 systems have such a market concentration. (Chart 4-6c)

Corporate Name Changes

An ongoing trend among a number of senior living organizations throughout the country, both multi-sites and single-site organizations, is that of changing the name of the organization to reflect more accurately the services provided. Section 4-7 details recent name changes that took place during 2014.

Ratings

There are currently three rating agencies that rate senior living debt: Moody's, Standard & Poor's, and Fitch Ratings, two of which, Standard & Poor's and Fitch Ratings, are currently active. A listing of multi-site organizations with debt rated by Standard & Poor's or Fitch Ratings is shown in Chart 4-8a. A multi-site with an "NR" shown as an agency's rating means that the multi-site does not have its debt rated by that agency as of 12/31/14. Forty-eight (48) of the LZ 150 organizations have outstanding debt rated by Standard & Poor's and/or Fitch Ratings. Chart 4-8b presents the categories of each of the ratings, showing that the majority, 46 percent, 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 to capture the type of revenue generated by each respective organization. Starting with the 2014 LZ 150 publication, a slightly different approach was taken to gather revenue. As an additional means of evaluating the size of each organization (in addition to the total number of units and communities), overall revenue was gathered as part of the survey process. The majority 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 2014, organizations were grouped into

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

Corporate Staff

Yet another area of the 2015 LZ 150 is an analysis of the corporate level staffing of select operating areas for the LZ 150 organizations (Charts 4-10a-c). Corporate-level positions, as well as reporting executive, changes in corporate staffing, and corporate tenure are all reported in this section.

Accreditation

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

The listing of LZ 150 with organizations that have obtained CARF-CCAC or JCAHO (Joint Commission on the Accreditation of Healthcare Organizations) accreditation is shown in Chart 4-11a. A total of 168 communities within the LZ 150 are accredited through CARF-CCAC. An additional 39 have sought accreditation through JCAHO.

Staffing

The LZ 150 analyses include an examination of the number of full-time equivalents (FTEs) each organization employs. An average of approximately 1,094 FTEs are employed per organization. Note that the number of FTEs decreased in the 2014 and 2015 publications with the expansion to the largest 150 organizations.

Affiliation

Nearly 90% of the LZ 150 organizations have an affiliation with a religious organization or a fraternal or military group (Chart 4-14a). The majority of those with affiliations are faith-based, predominantly Lutheran, Methodist, Presbyterian and Baptist. When looking at the number of units represented by each of the affiliations, Lutheran organizations represent the largest number within the LZ 150, with more than 49,000 units. Presbyterian affiliation follows with slightly more than 34,000 units.

Affordable Housing

The ranking of the LZ 150 organizations by the number of affordable (non market-rate) units is included with this research to show that a number of the LZ 150 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management of these organizations and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Section 4-15 and Chapter 6 detail these listings further. The data reveal that among the LZ 150, nearly half (46%) have affordable housing units.

Managed Units and Communities

It is not uncommon for a senior living community to be managed by an organization that does not own it. In fact, there are several companies in the senior living sector whose primary business purpose is to provide management services to properties they don't own. The LZ 150 organizations are, on the contrary, primarily property owners. Approximately 31% of the LZ 150 manage as well as own senior living units (Chart 4-16c), but the overwhelming portion of their portfolio of units is owned.

Assisted and Skilled Composition

Tracked in the last two years has been 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 92% being private. On the other hand, the skilled nursing units are more likely to be semi-private, with 59.8% of the units semi-private and 40.2% private.

This year's publication is the fifth in which the percentage of LZ 150 organizations that own and operate memory support (MS) units is analyzed. Section 4-17 details the percentage of LZ 150, by the largest 10, 25, 50, 100 and 150, that offer specialized memory support units. In total, roughly 79% of the organizations offer memory support, with 37% offering both assisted living and skilled nursing memory care services. An additional 33% offer only assisted living memory support.

Home and Community-Based Services (HCBS)

This year's survey gathered overall feedback on the percentage of providers offering home and community-based services, but specifically drilled down into Continuing Care at Home (CCaH), Program of All-Inclusive Care for the Elderly (PACE), and hospice services for individuals in the greater community. Overall, 56% of the LZ 150 organizations offer home and community-based services to non-residents. CCaH, a model growing in popularity, is offered by nearly 13% of the LZ 150. Approximately 10% have PACE programs, and hospice services are being provided by 36%.

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, 78% and 71% respectively, reported using User-Activated Emergency Response Systems and Access Control/Wander Management Systems. Additional detailed findings are reported throughout that section. Additional data were also gathered this year for single-site organizations. Chapter 6 reveals the proportion of those organizations 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. Nearly one-third of the LZ 150 organizations reported being in a joint venture. Most commonly, this is a venture with another not-for-profit organization, a hospital/health system or a home health/home care agency. With regard to formal health care reform contacts, roughly a quarter of the organizations are in a formal ACO or bundled payment contract.

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2013 to 2014
				2014 Units				2013 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	2	National Senior Campuses	MD	18,122	15,503	1,270	1,349	17,682	15,247	1,173	1,262	440
2	1	Evangelical Lutheran Good Samaritan Society	SD	18,048	5,032	2,262	10,754	18,286	4,936	2,194	11,156	-238
3	3	ACTS Retirement-Life Communities	PA	7,993	5,652	904	1,437	8,051	5,711	907	1,433	-58
4	4	Presbyterian Homes and Services	MN	6,867	3,332	2,077	1,458	6,782	3,339	2,065	1,378	85
5	5	Covenant Retirement Communities, Inc.	IL	4,865	3,098	818	949	4,703	3,110	758	835	162
6	6	Retirement Housing Foundation	CA	4,098	2,642	861	595	4,104	2,636	873	595	-6
7	7	Lifespace Communities, Inc.	IA	4,069	3,086	154	829	4,072	3,093	154	825	-3
8	8	The Kendal Corporation	PA	3,732	2,522	649	561	3,727	2,554	617	556	5
9	9	Lutheran Senior Services	MO	3,406	1,665	752	989	3,359	1,669	710	980	47
10	10	Westminster Communities of Florida	FL	3,253	2,031	471	751	3,312	2,106	455	751	-59
11	11	Presbyterian Senior Living	PA	3,120	1,503	498	1,119	3,176	1,425	499	1,252	-56
12	13	Cornerstone Affiliates	CA	3,097	1,858	557	682	2,960	1,735	368	857	137
13	19	Ecumen	MN	3,023	290	2,106	627	2,371	288	1,447	636	652
14	12	Ohio Presbyterian Retirement Services	OH	3,010	1,516	617	877	3,022	1,669	557	796	-12
15	15	Pacific Retirement Services	OR	2,826	2,086	333	407	2,824	2,092	344	388	2
16	14	Front Porch Communities and Services	CA	2,823	1,838	447	538	2,835	1,816	481	538	-12
17	16	Asbury Communities	MD	2,774	1,941	335	498	2,773	1,941	334	498	1
18	18	Presbyterian Manors of Mid-America, Inc.	KS	2,415	837	591	987	2,375	840	547	988	40
19	22	Diakon Lutheran Social Ministries	PA	2,407	903	535	969	2,261	940	490	831	146
20	20	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,366	1,436	861	69	2,347	1,419	259	669	19
21	21	Volunteers of America	VA	2,335	480	707	1,148	2,335	480	707	1,148	0
22	17	Christian Homes, Inc.	IL	2,167	387	306	1,474	2,508	544	283	1,681	-341
23	23	Shell Point	FL	2,049	1,332	389	328	2,037	1,332	377	328	12
24	24	Willow Valley Communities	PA	2,033	1,536	222	275	2,026	1,530	219	277	7
25	25	Springpoint Senior Living, Inc.	NJ	1,967	1,429	271	267	1,981	1,445	279	257	-14

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2013 to 2014
				2014 Units				2013 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	26	Franciscan Communities, Inc.	IL	1,944	736	433	775	1,912	751	385	776	32
27	27	Augustana Care	MN	1,901	0	1,120	781	1,901	0	1,120	781	0
28	31	Concordia Lutheran Ministries	PA	1,873	554	965	354	1,728	554	878	296	145
29	30	Senior Quality Lifestyles Corporation	TX	1,858	1,130	419	309	1,782	1,054	419	309	76
30	34	National Church Residences	OH	1,855	778	535	542	1,616	604	472	540	239
31	28	Otterbein Senior Lifestyle Choices	OH	1,811	722	382	707	1,797	744	350	703	14
32	29	Christian Care Companies	AZ	1,789	1,434	289	66	1,789	1,434	289	66	0
33	36	Elim Care, Inc.	MN	1,728	197	451	1,080	1,592	154	430	1,008	136
34	33	Homewood Retirement Centers	MD	1,694	965	278	451	1,646	918	277	451	48
35	38	Providence Life Services	IL	1,603	665	360	578	1,553	665	360	528	50
36	35	Hebrew SeniorLife	MA	1,593	660	119	814	1,593	660	119	814	0
37	42	Buckner Retirement Services, Inc.	TX	1,585	857	372	356	1,456	857	243	356	129
38	32	Jewish Home Lifecare	NY	1,585	24	0	1,561	1,651	21	0	1,630	-66
39	37	Eskaton	CA	1,562	531	605	426	1,565	533	606	426	-3
40	39	Episcopal Senior Communities	CA	1,550	1,054	120	376	1,488	1,013	99	376	62
41	40	Magnolia Manor	GA	1,483	339	335	809	1,483	339	335	809	0
42	41	Loretto	NY	1,475	259	593	623	1,475	259	593	623	0
43	50	Bethesda Senior Living Communities	CO	1,467	155	1,312	0	1,362	155	1,207	0	105
44	43	Presbyterian Homes	IL	1,445	855	225	365	1,446	859	224	363	-1
45	44	Mississippi Methodist Senior Services, Inc.	MS	1,442	807	315	320	1,442	807	315	320	0
46	45	WesleyLife	IA	1,431	692	301	438	1,431	694	299	438	0
47	46	Holland Home	MI	1,419	723	435	261	1,419	723	455	241	0
48	48	Greencroft Communities	IN	1,409	520	390	499	1,406	517	390	499	3
49	49	Bethesda Health Group, Inc.	MO	1,375	555	18	802	1,369	549	18	802	6
50	51	be.group	CA	1,352	854	267	231	1,359	859	268	232	-7

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2013 to 2014
				2014 Units				2013 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	73	Wesley Enhanced Living	PA	1,322	829	193	300	1,022	501	221	300	300
52	53	Baptist Village Communities	OK	1,280	774	181	325	1,280	774	181	325	0
53	54	Lutheran Life Ministries	IL	1,271	233	291	747	1,279	233	299	747	-8
54	55	Masonicare, Inc.	CT	1,264	458	277	529	1,266	458	272	536	-2
55	56	Lutheran Services Carolinas	NC	1,262	257	273	732	1,262	257	273	732	0
56	52	Presbyterian Villages of Michigan	MI	1,253	836	239	178	1,318	901	239	178	-65
57	58	SantaFe Senior Living	FL	1,231	876	255	100	1,228	876	252	100	3
58	60	Virginia United Methodist Homes, Inc.	VA	1,231	515	435	281	1,213	516	424	273	18
59	59	Phoebe Ministries	PA	1,230	374	175	681	1,216	378	171	667	14
60	57	Friendship Senior Options	IL	1,213	783	182	248	1,259	785	183	291	-46
61	62	American Baptist Homes of the Midwest	MN	1,200	374	209	617	1,200	374	209	617	0
62	61	Virginia Baptist Homes	VA	1,192	748	225	219	1,204	760	225	219	-12
63	64	Integrace	MD	1,150	645	228	277	1,156	651	228	277	-6
64	65	Lutheran Social Services of South Central Pennsylvania	PA	1,149	554	251	344	1,138	553	251	334	11
65	66	Presbyterian SeniorCare	PA	1,114	348	351	415	1,114	348	351	415	0
66	80	United Methodist Memorial Home	IN	1,110	249	513	348	946	199	472	275	164
67	63	Lutheran SeniorLife	PA	1,106	472	192	442	1,173	481	234	458	-67
68	69	United Methodist Homes	NY	1,057	390	241	426	1,061	394	241	426	-4
69	70	Walker Methodist	MN	1,034	493	165	376	1,034	493	165	376	0
70	71	Lutheran Homes of South Carolina	SC	1,029	405	308	316	1,029	386	327	316	0
71	72	United Methodist Homes of New Jersey	NJ	1,026	88	686	252	1,026	88	686	252	0
72	74	Elant	NY	995	148	144	703	995	148	144	703	0
73	75	Blue Skies of Texas	TX	986	730	129	127	993	728	129	136	-7
74	76	United Church Homes, Inc.	OH	969	177	145	647	983	110	205	668	-14
75	77	Presby's Inspired Life	PA	960	493	207	260	965	491	214	260	-5

NR indicates that organization was not among largest 150 in the 2014 report

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2013 to 2014
				2014 Units				2013 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	78	The Presbyterian Homes, Inc.	NC	956	634	133	189	958	636	133	189	-2
77	79	United Church Homes and Services	NC	951	533	90	328	948	530	74	344	3
78	68	Northern California Presbyterian Homes and Services, Inc.	CA	949	706	102	141	1,088	824	123	141	-139
79	81	The United Methodist Retirement Homes, Inc.	NC	933	626	105	202	933	626	105	202	0
80	82	Menno Haven	PA	920	531	177	212	920	531	177	212	0
81	85	Liberty Lutheran Services	PA	893	384	301	208	893	384	301	208	0
82	86	VMP	WI	889	447	205	237	889	447	205	237	0
83	88	Westminster Ingleside Retirement Communities	DC	885	607	113	165	877	607	124	146	8
84	87	Oakwood Lutheran Senior Ministries	WI	885	588	160	137	885	588	160	137	0
85	110	Eventide	MN	882	73	326	483	742	73	268	401	140
86	89	St. Ann's Community	NY	863	246	75	542	863	246	75	542	0
87	91	Living Branches	PA	852	463	246	143	852	463	246	143	0
88	92	Presbyterian Communities of South Carolina	SC	852	270	316	266	850	270	314	266	2
89	90	Presbyterian Communities and Services	TX	843	329	134	380	856	329	139	388	-13
90	130	Christian Care Communities, Inc.	KY	839	185	186	468	653	185	0	468	186
91	93	Simpson Senior Services	PA	839	494	153	192	839	494	153	192	0
92	94	Goodwin House Incorporated	VA	831	583	248	0	832	585	99	148	-1
93	95	Los Angeles Jewish Home	CA	831	50	271	510	831	50	271	510	0
94	97	Luthercare	PA	811	474	126	211	810	473	126	211	1
95	98	Givens Estates	NC	809	588	77	144	802	581	77	144	7
96	134	Heritage Ministries	NY	806	247	139	420	624	156	68	400	182
97	84	Cedar Community	WI	796	322	241	233	895	425	241	229	-99
98	102	BHI Senior Living, Inc.	IN	795	155	415	225	769	147	397	225	26
99	101	Western Home Communities	IA	790	420	238	132	779	382	297	100	11
100	111	The Ohio Masonic Home	OH	781	338	249	194	738	343	201	194	43

NR indicates that organization was not among largest 150 in the 2014 report

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2013 to 2014
				2014 Units				2013 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
101	99	Morningside Ministries	TX	772	318	134	320	789	318	135	336	-17
102	103	United Church of Christ Homes	PA	766	267	124	375	766	267	124	375	0
103	105	Lutheran Social Services of Michigan	MI	765	289	120	356	757	281	120	356	8
104	100	Sunnyside Presbyterian Home, Inc.	VA	763	501	128	134	780	504	142	134	-17
105	107	Life Enriching Communities	OH	762	467	136	159	751	458	134	159	11
106	104	Methodist Retirement Communities	TX	761	318	229	214	761	318	229	214	0
107	108	Garden Spot Village	PA	747	542	86	119	747	542	86	119	0
108	106	Christian Care Senior Living Communities	TX	747	386	138	223	752	386	138	228	-5
109	NR	Sun Health Senior Living, LLC	AZ	746	565	31	150	NR	N/A	N/A	N/A	N/A
110	109	Christian Living Ventures	CO	744	414	152	178	744	413	152	179	0
111	83	Mather LifeWays	IL	741	624	46	71	900	623	46	231	-159
112	115	Landis Communities	PA	736	489	144	103	718	471	144	103	18
113	112	Wellspring Lutheran Services	MI	736	128	224	384	736	128	224	384	0
114	113	Luther Manor	WI	732	366	156	210	732	366	156	210	0
115	NR	Wesley Willows	IL	706	445	170	91	NR	N/A	N/A	N/A	N/A
116	116	Lutheran Homes Society	OH	702	141	172	389	706	142	171	393	-4
117	117	Saint Therese	MN	693	302	69	322	693	302	69	322	0
118	Nxt Nxt 25	Episcopal SeniorLife Communities	NY	690	377	131	182	373	68	123	182	317
119	118	Wesley Homes	WA	688	453	87	148	688	453	87	148	0
120	Nxt Nxt 25	St. Andrew's Resources for Seniors System	MO	684	337	164	183	373	187	97	89	311
121	122	CRISTA Senior Living	WA	680	382	131	167	680	382	131	167	0
122	120	Masonic Homes of Kentucky	KY	680	302	125	253	680	302	125	253	0
124	123	Lutheran Social Ministries of New Jersey	NJ	678	281	130	267	678	281	130	267	0
123	121	Messiah Lifeways	PA	678	337	157	184	680	339	157	184	-2
125	119	Lutheran Life Villages	IN	678	154	115	409	684	154	127	403	-6

NR indicates that organization was not among largest 150 in the 2014 report

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1a RANK, DETAILED BY UNITS (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2013 to 2014
				2014 Units				2013 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
126	125	Vincentian Collaborative System	PA	675	66	82	527	675	66	82	527	0
127	137	Presbyterian Retirement Communities Northwest	WA	673	479	132	62	591	397	132	62	82
128	129	National Lutheran Communities & Services	MD	668	396	102	170	656	397	89	170	12
130	126	LifeStream Complete Senior Living, Inc.	AZ	661	357	144	160	661	357	144	160	0
129	124	Maple Knoll Communities, Inc.	OH	661	364	90	207	676	368	90	218	-15
131	127	United Methodist Homes	CT	659	90	406	163	659	90	406	163	0
132	131	LindenGrove, Inc.	WI	650	0	189	461	650	0	189	461	0
133	133	The Loomis Communities	MA	634	427	73	134	635	427	74	134	-1
134	96	Sunset Retirement Communities and Services	MI	634	304	200	130	822	491	201	130	-188
135	Next 25	Deaconess Abundant Life Communities	MA	625	377	165	83	507	338	86	83	118
136	145	Porter Hills	MI	622	356	116	150	573	356	116	101	49
137	135	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	621	272	140	209	0
138	136	Smith Senior Living	IL	615	325	144	146	615	325	144	146	0
139	138	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	587	238	229	120	0
140	139	Lutheran Social Services of the South, Inc.	TX	586	339	149	98	586	339	149	98	0
141	144	St. John's Lutheran Ministries	MT	586	144	256	186	576	144	246	186	10
142	140	Sholom Community Alliance	MN	583	153	143	287	583	153	143	287	0
143	142	Baptist Homes Society	PA	580	257	134	189	580	257	134	189	0
144	143	Friends Homes, Inc.	NC	577	368	100	109	577	368	100	109	0
145	146	United Methodist Retirement Communities, Inc.	MI	575	280	210	85	564	279	200	85	11
146	114	Albright Care Services	PA	575	266	85	224	723	269	166	288	-148
147	147	Masonic Homes of California	CA	562	302	135	125	562	302	135	125	0
149	148	Baptist Life Communities	KY	560	218	75	267	560	218	75	267	0
150	NR	Bethany Lutheran Homes	WI	560	170	267	123	NR	N/A	N/A	N/A	N/A
148	150	Life Care Pastoral Services	FL	550	384	76	90	550	384	76	90	0

NR indicates that organization was not among largest 150 in the 2014 report

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

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

Largest	ILU	ALU	NCB	Total Units	% as total of LZ 150 units
10	44,563	10,218	19,672	74,453	31.5%
25	63,935	18,993	29,937	112,865	47.7%
50	80,001	29,632	43,461	153,094	64.7%
100	102,543	40,953	59,713	203,209	85.9%
150	118,660	48,094	69,809	236,563	100.0%

Largest	2015 Total Units	2014 Total Units	Change in total units	Percent change in total units
10	74,453	72,736	1,717	2.3%
25	112,865	111,237	1,628	1.4%
50	153,094	150,985	2,109	1.4%
100	203,209	201,305	1,904	0.9%
150	236,563	N/A	N/A	N/A

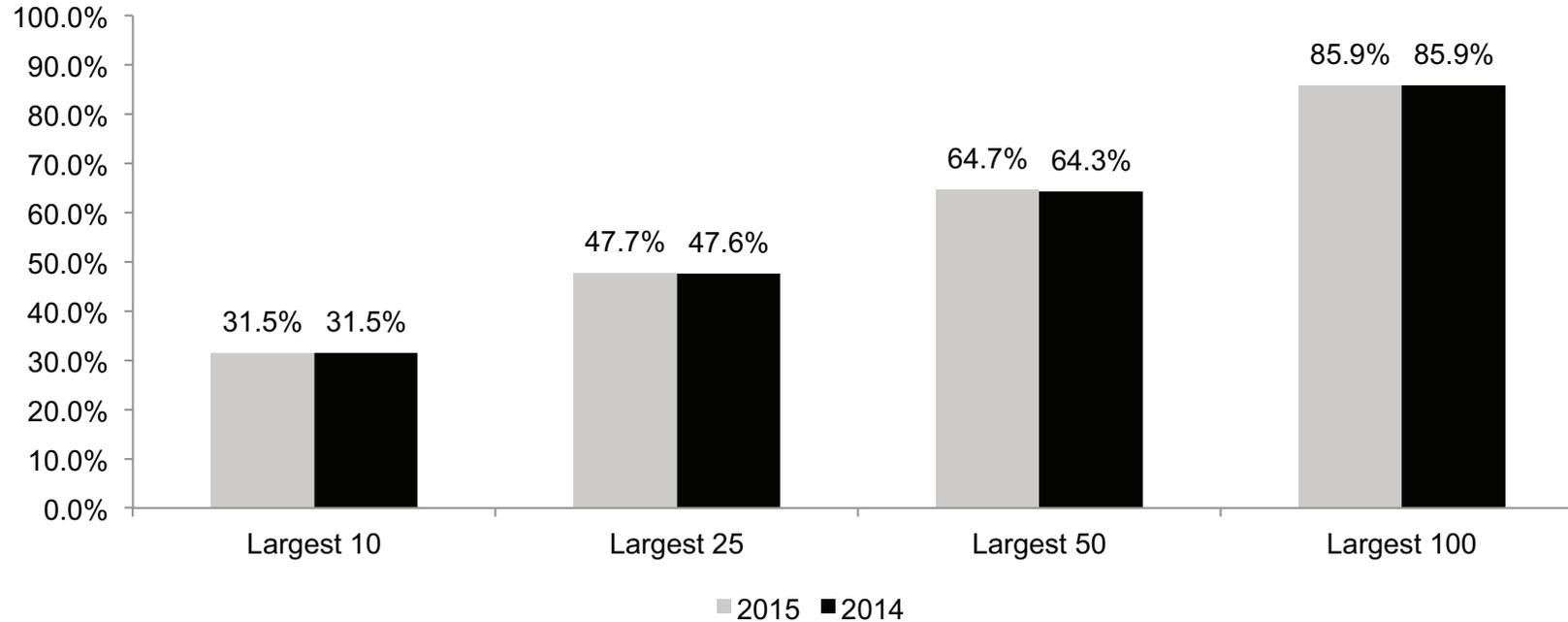
Analysis of Unit Mix for Each Year's Respective LZ 150 Listing*				
2013 LZ 100				
2012 avg units/system	1,016.6	368.7	618.4	2,003.7
% of total	50.7%	18.4%	30.9%	100.0%
2014 LZ 100				
2013 avg units/system	781.8	303.4	483.4	1,575.2
% of total	49.8%	19.3%	30.8%	100.0%
2015 LZ 150				
2014 avg units/system	791.1	320.6	465.4	1,577.1
% of total	50.2%	20.3%	29.5%	100.0%

*Note change from 100 to 150 with the 2014 publication

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

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

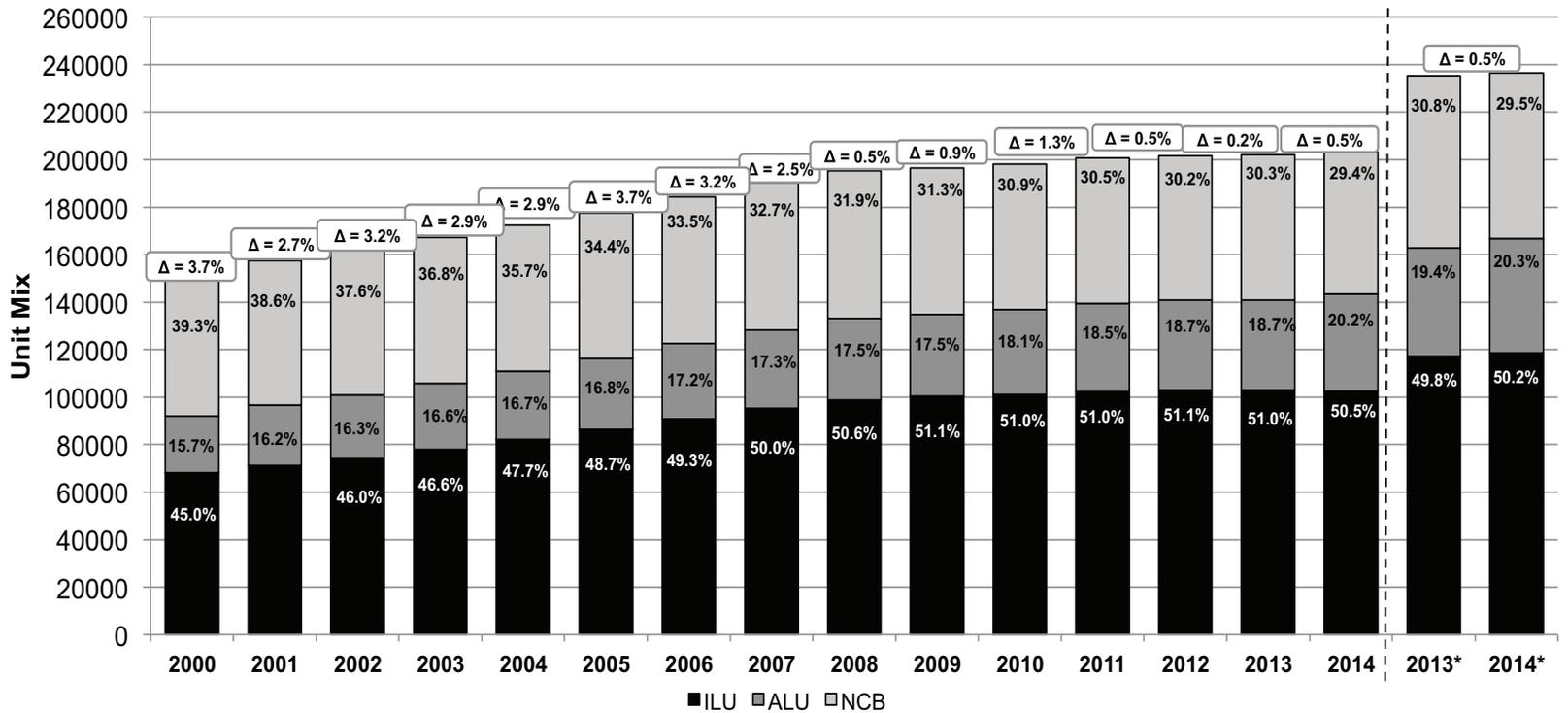


**Note change from 100 to 150 with the 2014 publication*

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1d TOTAL UNIT MIX BY YEAR, BY TOTAL UNITS, 2000 THROUGH 2014 FOR 2015 LZ 150

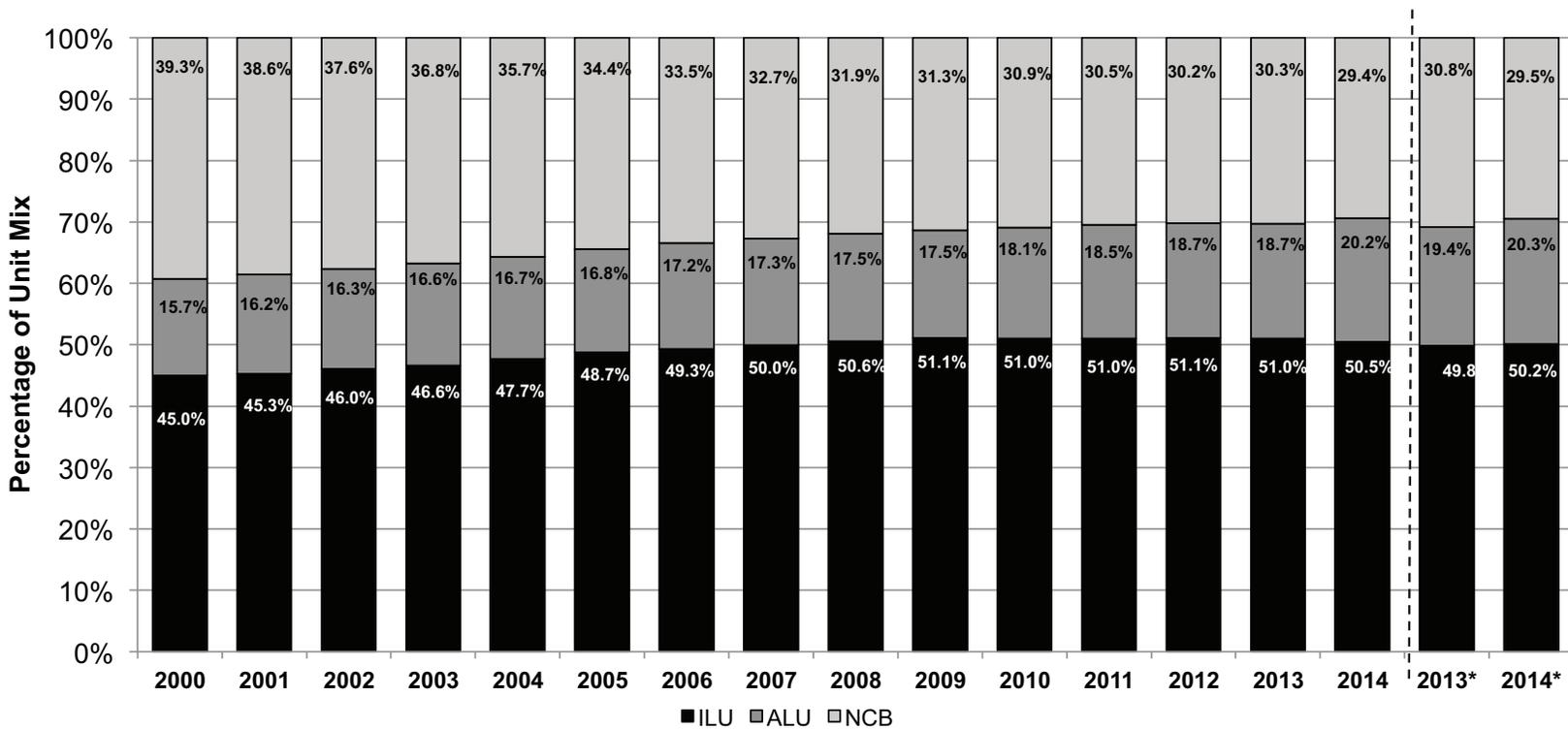


*Reflects change from 100 to 150 with the 2014 publication

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1e TOTAL UNIT MIX BY YEAR, BY PERCENT, 2000 THROUGH 2014 FOR 2015 LZ 150

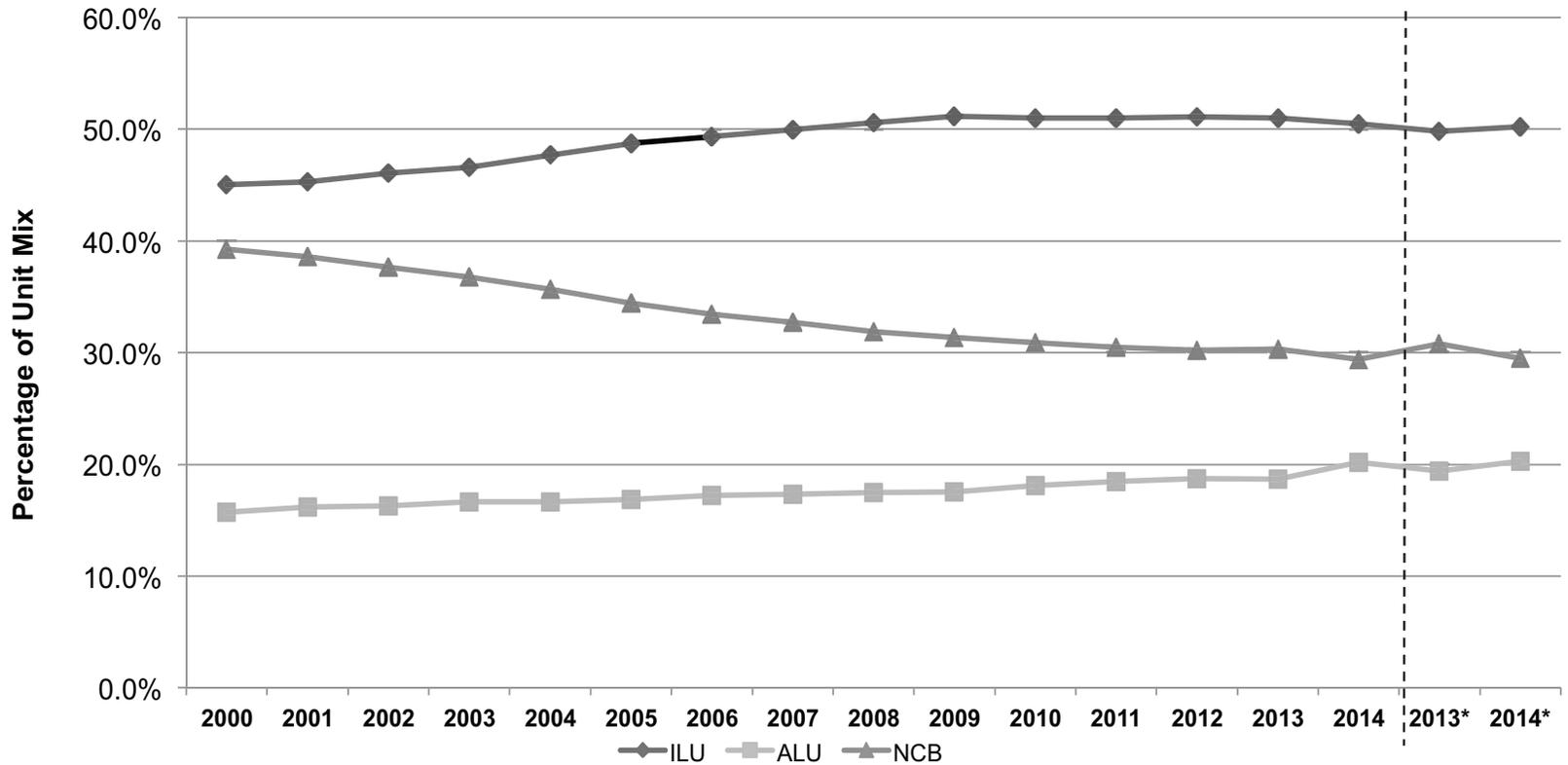


*Reflects change from 100 to 150 with the 2014 publication

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1f YEAR OVER YEAR CHANGE IN PERCENTAGE OF UNIT MIX, 2000 THROUGH 2014 FOR 2015 LZ 150

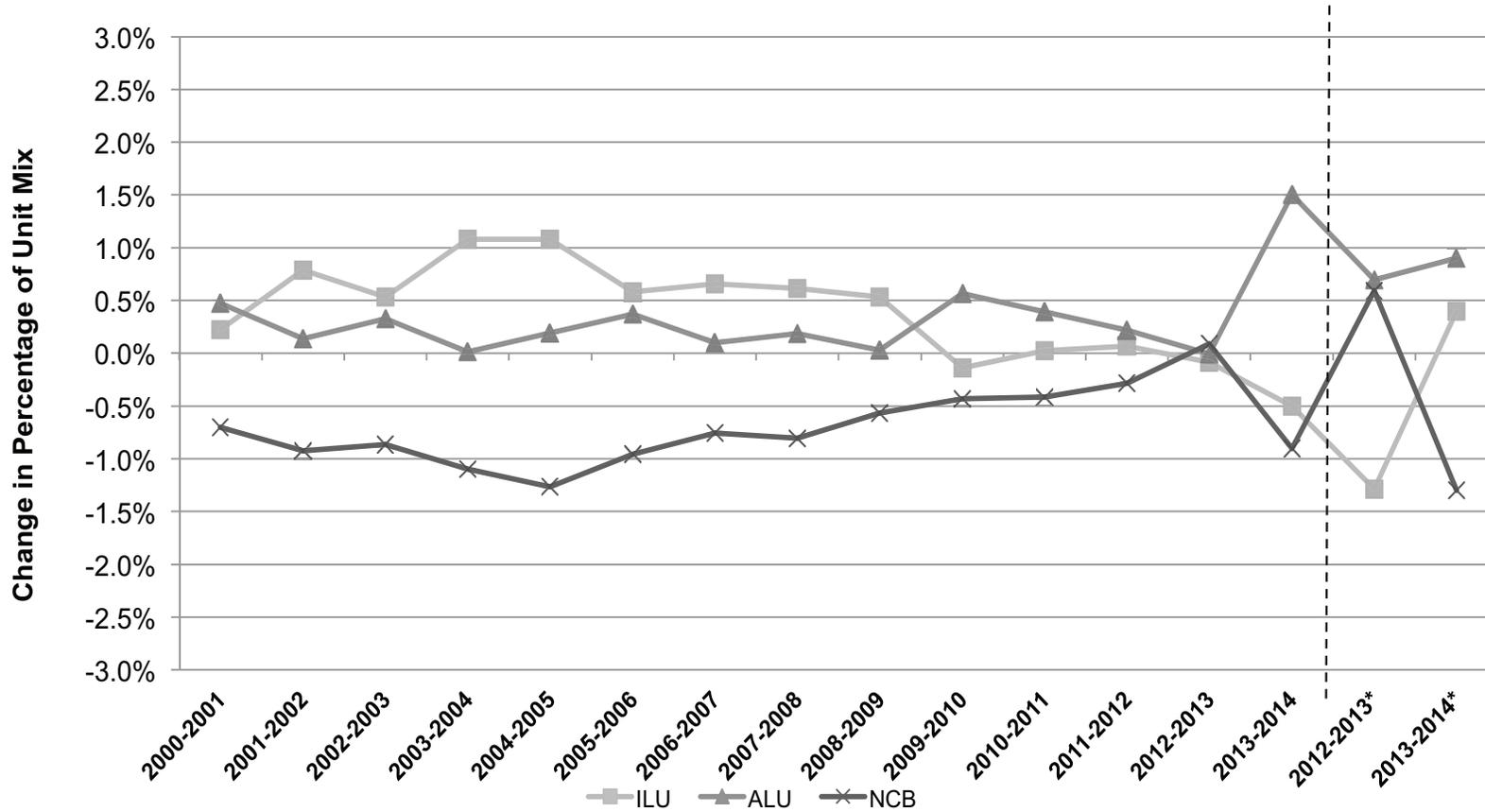


*Reflects change from 100 to 150 with the 2014 publication

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1g PERCENTAGE CHANGE IN UNIT MIX, 2000 THROUGH 2014 FOR 2015 LZ 150

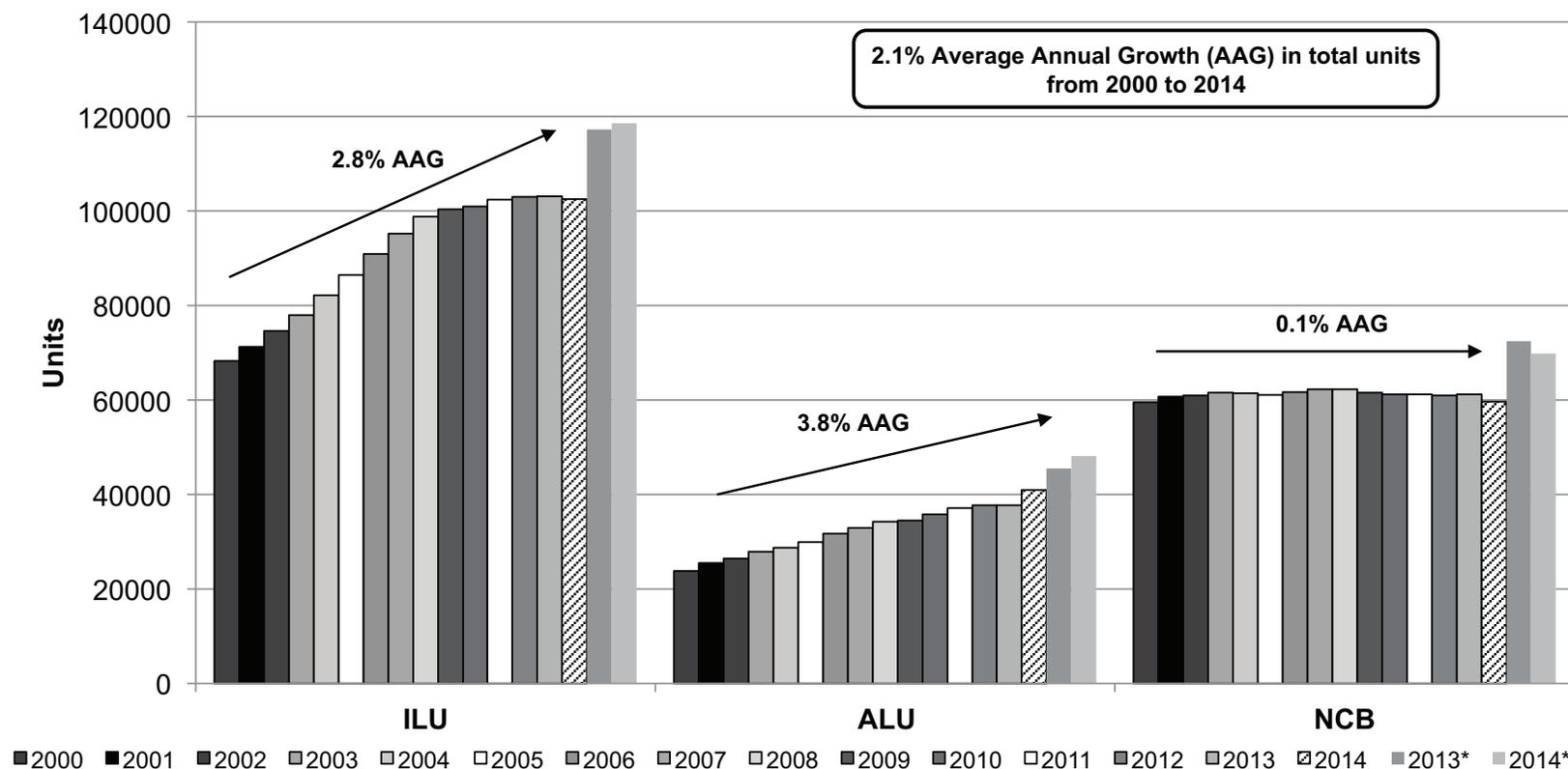


*Reflects change from 100 to 150 with the 2014 publication

4-1 2015 LeadingAge Ziegler 150

Organizational Characteristics: Units

4-1h UNIT TYPE COMPARISON, BY UNITS, 2000 THROUGH 2014 FOR 2015 LZ 150



*Reflects change from 100 to 150 with the 2014 publication

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2013 to 2014
				2014 Communities					2013 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
1	2	National Senior Campuses	MD	15	15	0	0	0	15	15	0	0	0	0
2	1	Evangelical Lutheran Good Samaritan Society	SD	170	71	7	8	84	173	77	8	35	53	-3
3	3	ACTS Retirement-Life Communities	PA	23	23	0	0	0	23	23	0	0	0	0
4	4	Presbyterian Homes and Services	MN	38	12	21	2	3	37	12	21	2	2	1
5	5	Covenant Retirement Communities, Inc.	IL	15	13	1	1	0	15	13	1	1	0	0
6	6	Retirement Housing Foundation	CA	18	9	8	1	0	18	9	8	1	0	0
7	7	Lifespace Communities, Inc.	IA	12	12	0	0	0	12	12	0	0	0	0
8	8	The Kendal Corporation	PA	15	13	2	0	0	15	13	2	0	0	0
9	9	Lutheran Senior Services	MO	11	9	0	1	1	11	9	0	1	1	0
10	10	Westminster Communities of Florida	FL	9	9	0	0	0	9	9	0	0	0	0
11	11	Presbyterian Senior Living	PA	20	12	6	2	0	20	12	5	2	1	0
12	13	Cornerstone Affiliates	CA	11	11	0	0	0	11	11	0	0	0	0
13	19	Ecumen	MN	36	0	4	24	8	36	0	4	24	8	0
14	12	Ohio Presbyterian Retirement Services	OH	12	12	0	0	0	11	11	0	0	0	1
15	15	Pacific Retirement Services	OR	9	8	1	0	0	9	8	1	0	0	0
16	14	Front Porch Communities and Services	CA	10	5	5	0	0	10	5	5	0	0	0
17	16	Asbury Communities	MD	5	5	0	0	0	5	5	0	0	0	0
18	18	Presbyterian Manors of Mid-America, Inc.	KS	18	16	0	1	1	18	16	0	1	1	0
19	22	Diakon Lutheran Social Ministries	PA	9	9	0	0	0	9	9	0	0	0	0
20	20	Masonic Villages of the Grand Lodge of Pennsylvania	PA	5	3	1	1	0	5	3	1	1	0	0
21	21	Volunteers of America	VA	24	4	3	7	10	24	4	3	7	10	0
22	17	Christian Homes, Inc.	IL	13	11	0	1	1	13	13	0	0	0	0
23	23	Shell Point	FL	2	2	0	0	0	2	2	0	0	0	0
24	24	Willow Valley Communities	PA	3	3	0	0	0	3	3	0	0	0	0
25	25	Springpoint Senior Living, Inc.	NJ	6	6	0	0	0	6	6	0	0	0	0

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2013 to 2014
				2014 Communities					2013 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
26	26	Franciscan Communities, Inc.	IL	8	4	1	3	0	8	4	1	3	0	0
27	27	Augustana Care	MN	18	0	0	12	6	18	0	0	12	6	0
28	31	Concordia Lutheran Ministries	PA	11	5	0	6	0	10	4	0	6	0	1
29	30	Senior Quality Lifestyles Corporation	TX	6	6	0	0	0	6	6	0	0	0	0
30	34	National Church Residences	OH	10	5	2	2	1	8	5	0	2	1	2
31	28	Otterbein Senior Lifestyle Choices	OH	11	5	0	0	6	10	5	0	0	5	1
32	29	Christian Care Companies	AZ	4	1	3	0	0	4	1	3	0	0	0
33	36	Elim Care, Inc.	MN	24	0	4	9	11	23	0	4	9	10	1
34	33	Homewood Retirement Centers	MD	5	4	1	0	0	5	4	1	0	0	0
35	38	Providence Life Services	IL	9	1	4	1	3	9	1	4	1	3	0
36	35	Hebrew SeniorLife	MA	4	2	1	0	1	4	2	1	0	1	0
37	42	Buckner Retirement Services, Inc.	TX	7	5	2	0	0	7	5	2	0	0	0
38	32	Jewish Home Lifecare	NY	4	0	1	0	3	4	0	1	0	3	0
39	37	Eskaton	CA	13	1	3	6	3	13	1	3	6	3	0
40	39	Episcopal Senior Communities	CA	6	6	0	0	0	6	6	0	0	0	0
41	40	Magnolia Manor	GA	8	2	4	1	1	8	2	4	1	1	0
42	41	Loretto	NY	8	1	2	4	1	8	1	2	4	1	0
43	50	Bethesda Senior Living Communities	CO	19	0	2	17	0	18	0	1	17	0	1
44	43	Presbyterian Homes	IL	5	3	1	1	0	5	3	1	1	0	0
45	44	Mississippi Methodist Senior Services, Inc.	MS	12	2	8	0	2	12	2	8	0	2	0
46	45	WesleyLife	IA	7	7	0	0	0	7	7	0	0	0	0
47	46	Holland Home	MI	4	3	0	0	1	4	3	0	0	1	0
48	48	Greencroft Communities	IN	6	6	0	0	0	6	6	0	0	0	0
49	49	Bethesda Health Group, Inc.	MO	7	1	4	0	2	7	1	4	0	2	0
50	51	be.group	CA	7	6	0	1	0	7	6	0	1	0	0

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2013 to 2014
				2014 Communities					2013 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
51	73	Wesley Enhanced Living	PA	6	4	1	1	0	6	5	1	0	0	0
52	53	Baptist Village Communities	OK	8	3	5	0	0	8	3	5	0	0	0
53	54	Lutheran Life Ministries	IL	5	5	0	0	0	5	5	0	0	0	0
54	55	Masonicare, Inc.	CT	8	1	3	2	2	8	1	3	2	2	0
55	56	Lutheran Services Carolinas	NC	9	1	1	1	6	8	1	1	1	5	1
56	52	Presbyterian Villages of Michigan	MI	8	2	6	0	0	8	2	6	0	0	0
57	58	SantaFe Senior Living	FL	3	3	0	0	0	3	3	0	0	0	0
58	60	Virginia United Methodist Homes, Inc.	VA	7	6	0	1	0	7	6	0	1	0	0
59	59	Phoebe Ministries	PA	4	4	0	0	0	4	4	0	0	0	0
60	57	Friendship Senior Options	IL	2	2	0	0	0	2	2	0	0	0	0
61	62	American Baptist Homes of the Midwest	MN	8	4	1	2	1	8	4	1	2	1	0
62	61	Virginia Baptist Homes	VA	4	4	0	0	0	4	4	0	0	0	0
63	64	Integrace	MD	4	3	0	1	0	4	3	0	1	0	0
64	65	Lutheran Social Services of South Central Pennsylvania	PA	6	6	0	0	0	6	6	0	0	0	0
65	66	Presbyterian SeniorCare	PA	3	3	0	0	0	3	3	0	0	0	0
66	80	United Methodist Memorial Home	IN	3	3	0	0	0	3	3	0	0	0	0
67	63	Lutheran SeniorLife	PA	7	2	5	0	0	7	2	5	0	0	0
68	69	United Methodist Homes	NY	4	3	0	1	0	4	3	0	1	0	0
69	70	Walker Methodist	MN	6	1	4	1	0	6	1	4	1	0	0
70	71	Lutheran Homes of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
71	72	United Methodist Homes of New Jersey	NJ	5	1	0	4	0	5	1	0	4	0	0
72	74	Elant	NY	6	1	0	1	4	6	1	0	1	4	0
73	75	Blue Skies of Texas	TX	2	2	0	0	0	2	2	0	0	0	0
74	76	United Church Homes, Inc.	OH	6	4	0	0	2	6	4	0	0	2	0
75	77	Presby's Inspired Life	PA	4	2	0	1	1	4	2	0	1	1	0

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2013 to 2014
				2014 Communities					2013 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
76	78	The Presbyterian Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
77	79	United Church Homes and Services	NC	3	3	0	0	0	3	3	0	0	0	0
78	68	Northern California Presbyterian Homes and Services, Inc.	CA	5	3	1	1	0	5	3	1	1	0	0
79	81	The United Methodist Retirement Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
80	82	Menno Haven	PA	3	2	1	0	0	3	2	1	0	0	0
81	85	Liberty Lutheran Services	PA	4	3	0	1	0	4	3	0	1	0	0
82	86	VMP	WI	2	2	0	0	0	2	2	0	0	0	0
83	88	Westminster Ingleside Retirement Communities	DC	3	3	0	0	0	3	3	0	0	0	0
84	87	Oakwood Lutheran Senior Ministries	WI	2	2	0	0	0	2	2	0	0	0	0
85	110	Eventide	MN	6	3	0	2	1	7	0	1	3	3	-1
86	89	St. Ann's Community	NY	2	2	0	0	0	2	2	0	0	0	0
87	91	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
88	92	Presbyterian Communities of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
89	90	Presbyterian Communities and Services	TX	2	2	0	0	0	2	2	0	0	0	0
90	130	Christian Care Communities, Inc.	KY	5	1	3	1	0	6	4	3	1	1	-1
91	93	Simpson Senior Services	PA	3	3	0	0	0	3	3	0	0	0	0
92	94	Goodwin House Incorporated	VA	2	2	0	0	0	2	2	0	0	0	0
93	95	Los Angeles Jewish Home	CA	3	1	1	0	1	3	2	0	0	1	0
94	97	LutherCare	PA	3	2	0	0	1	3	2	0	0	1	0
95	98	Givens Estates	NC	2	2	0	0	0	2	2	0	0	0	0
96	134	Heritage Ministries	NY	9	1	3	2	3	8	0	3	2	3	1
97	84	Cedar Community	WI	6	1	2	2	1	6	1	2	2	1	0
98	102	BHI Senior Living, Inc.	IN	3	3	0	0	0	3	3	0	0	0	0
99	101	Western Home Communities	IA	3	1	1	1	0	2	1	1	0	0	1
100	111	The Ohio Masonic Home	OH	3	2	1	0	0	3	2	1	0	0	0

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2013 to 2014
				2014 Communities					2013 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
101	99	Morningside Ministries	TX	3	3	0	0	0	3	3	0	0	0	0
102	103	United Church of Christ Homes	PA	6	4	2	0	0	6	4	2	0	0	0
103	105	Lutheran Social Services of Michigan	MI	5	1	2	0	2	5	1	2	0	2	0
104	100	Sunnyside Presbyterian Home, Inc.	VA	3	3	0	0	0	3	3	0	0	0	0
105	107	Life Enriching Communities	OH	2	2	0	0	0	2	2	0	0	0	0
106	104	Methodist Retirement Communities	TX	4	4	0	0	0	4	4	0	0	0	0
107	108	Garden Spot Village	PA	2	1	0	0	1	2	1	0	0	1	0
108	106	Christian Care Senior Living Communities	TX	3	3	0	0	0	3	3	0	0	0	0
109	NR	Sun Health Senior Living, LLC	AZ	3	3	0	0	0						
110	109	Christian Living Ventures	CO	3	3	0	0	0	3	3	0	0	0	0
111	83	Mather LifeWays	IL	3	2	1	0	0	4	2	1	0	1	-1
112	115	Landis Communities	PA	3	1	1	0	1	3	1	1	0	1	0
113	112	Wellspring Lutheran Services	MI	10	1	3	2	4	10	1	3	2	4	0
114	113	Luther Manor	WI	2	1	0	1	0	2	1	0	1	0	0
115	NR	Wesley Willows	IL	2	1	1	0	0						
116	116	Lutheran Homes Society	OH	5	2	1	0	2	5	2	1	0	2	0
117	117	Saint Therese	MN	3	2	0	1	0	3	2	0	1	0	0
118	Nxt Nxt 25	Episcopal SeniorLife Communities	NY	7	0	4	2	1	5	0	2	2	1	2
119	118	Wesley Homes	WA	2	2	0	0	0	2	2	0	0	0	0
120	Nxt Nxt 25	St. Andrew's Resources for Seniors System	MO	5	2	1	1	1	3	1	1	1	0	2
121	122	CRISTA Senior Living	WA	2	1	1	0	0	2	1	1	0	0	0
122	120	Masonic Homes of Kentucky	KY	3	1	1	1	0	3	1	1	1	0	0
123	121	Messiah Lifeways	PA	2	1	1	0	0	2	1	1	0	0	0
124	123	Lutheran Social Ministries of New Jersey	NJ	2	1	0	0	1	2	1	0	0	1	0
125	119	Lutheran Life Villages	IN	3	1	0	0	2	3	1	0	0	2	0

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2a RANK, DETAILED BY COMMUNITIES (2014 VS. 2013)

2015 Rank	2014 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2013 to 2014
				2014 Communities					2013 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
126	125	Vincentian Collaborative System	PA	4	2	0	0	2	4	2	0	0	2	0
127	137	Presbyterian Retirement Communities Northwest	WA	4	3	1	0	0	3	3	0	0	0	1
128	129	National Lutheran Communities & Services	MD	3	2	0	1	0	3	2	0	1	0	0
129	124	Maple Knoll Communities, Inc.	OH	2	2	0	0	0	2	2	0	0	0	0
130	126	LifeStream Complete Senior Living, Inc.	AZ	8	0	3	3	2	8	0	3	3	2	0
131	127	United Methodist Homes	CT	4	1	0	3	0	4	1	0	3	0	0
132	131	LindenGrove, Inc.	WI	9	0	0	5	4	9	0	0	5	4	0
133	133	The Loomis Communities	MA	4	4	0	0	0	4	4	0	0	0	0
134	96	Sunset Retirement Communities and Services	MI	4	1	1	1	1	4	1	1	1	1	0
135	Next 25	Deaconess Abundant Life Communities	MA	5	3	1	1	0	4	3	1	0	0	1
136	145	Porter Hills	MI	3	1	1	1	0	3	1	1	1	0	0
137	135	Baptist Retirement Homes of North Carolina, Inc.	NC	4	2	0	2	0	4	2	0	2	0	0
138	136	Smith Senior Living	IL	2	2	0	0	0	2	2	0	0	0	0
139	138	Shepherd of the Valley Lutheran Retirement Services	OH	4	2	1	0	1	4	2	1	0	1	0
140	139	Lutheran Social Services of the South, Inc.	TX	4	2	1	1	0	4	2	1	1	0	0
141	144	St. John's Lutheran Ministries	MT	4	3	0	1	0	4	3	0	1	0	0
142	140	Sholom Community Alliance	MN	5	0	1	2	2	5	0	1	2	2	0
143	142	Baptist Homes Society	PA	2	1	0	1	0	2	1	0	1	0	0
144	143	Friends Homes, Inc.	NC	2	2	0	0	0	2	2	0	0	0	0
145	146	United Methodist Retirement Communities, Inc.	MI	3	2	1	0	0	3	2	1	0	0	0
146	114	Albright Care Services	PA	2	2	0	0	0	2	2	0	0	0	0
147	147	Masonic Homes of California	CA	3	3	0	0	0	3	3	0	0	0	0
148	150	Life Care Pastoral Services	FL	2	2	0	0	0	2	2	0	0	0	0
149	148	Baptist Life Communities	KY	4	1	2	0	1	4	1	2	0	1	0
150	NR	Bethany Lutheran Homes	WI	9	1	1	6	1						
		TOTAL COMMUNITIES		1,141	591	174	175	201	1,116	592	166	193	168	11

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

NR indicates that organization was not among largest 150 in the 2014 report

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

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

Largest	CCRC	IL	AL	NH	ALL	% as total of LZ 150
10	186	39	13	88	326	29%
25	287	59	49	108	503	44%
50	356	98	111	147	712	62%
100	501	141	139	172	953	84%
150	591	174	175	201	1,141	100%

Largest	2015 Total Communities	2014 Total Communities	Change in total communities	Percent change in total communities
10	326	328	-2	-0.6%
25	503	510	-7	-1.4%
50	712	732	-20	-2.8%
100	953	963	-10	-1.0%
150	1,141	1,163	-22	-1.9%

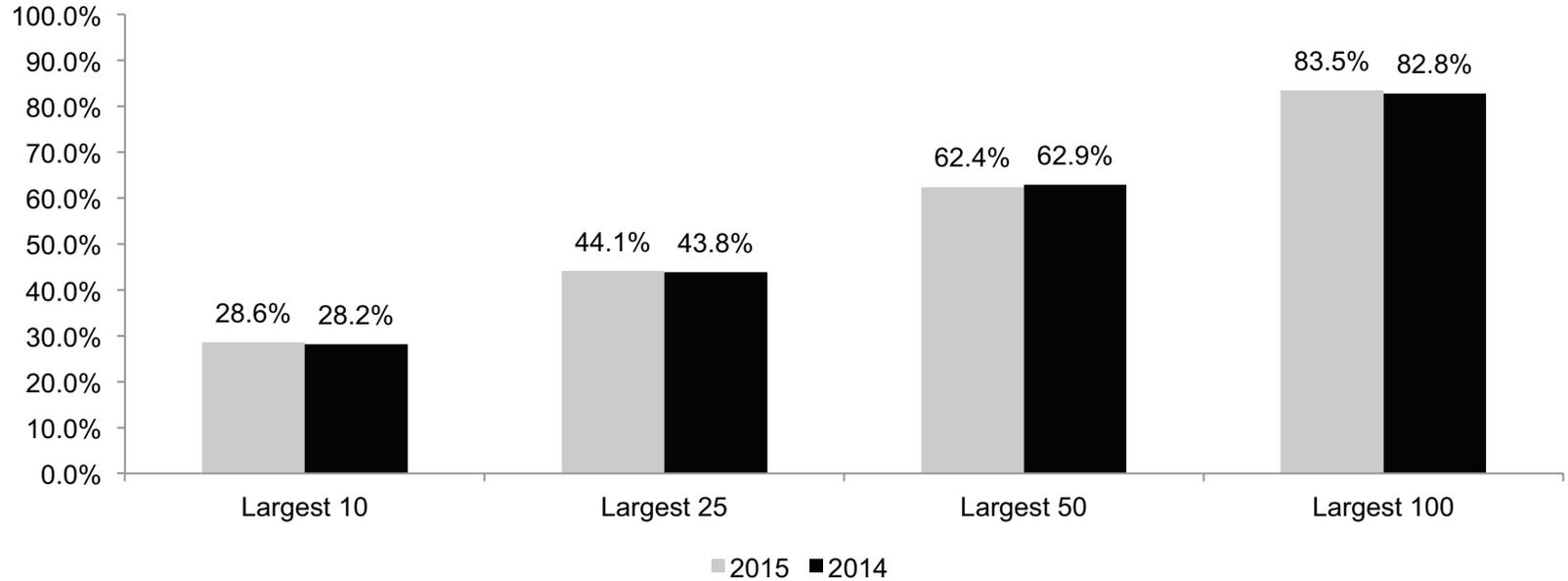
Analysis of Community Mix for Each Year's Respective LZ 150 Listing*					
	CCRC	IL	AL	NH	ALL
2013 LZ 100					
2012 avg communities/system	4.8	1.5	1.6	1.7	9.6
% of total	50.3%	15.4%	16.8%	17.6%	100.0%
2014 LZ 100					
2013 avg communities/system	5.1	1.4	1.6	1.5	9.5
% of total	53.7%	14.9%	16.8%	15.8%	100.0%
2015 LZ 150					
2014 avg communities/system	3.9	1.2	1.2	1.3	7.6
% of total	51.8%	15.2%	15.3%	17.6%	100.0%

*Note change from 100 to 150 with the 2014 publication

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

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

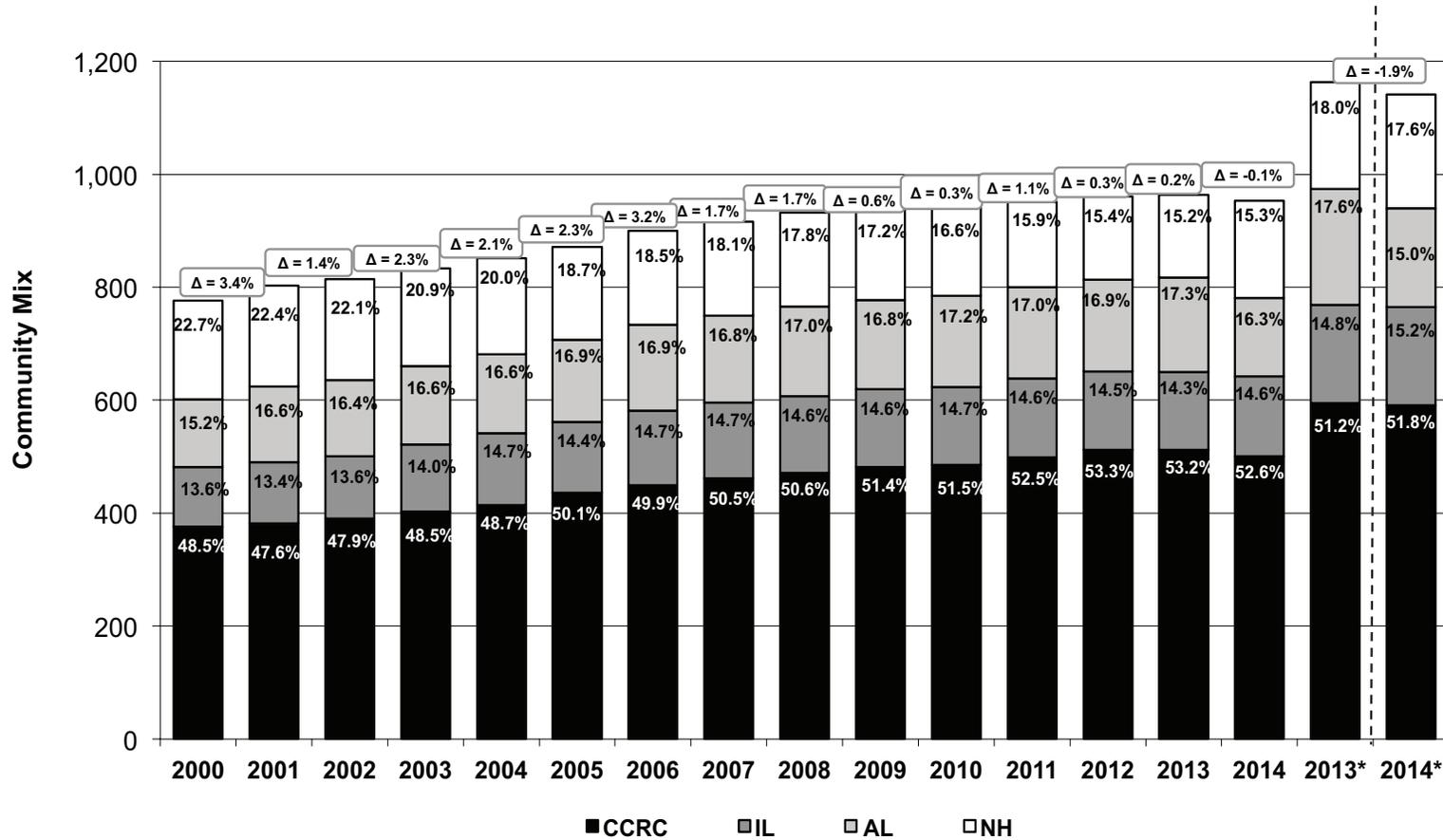


**Note change from 100 to 150 with the 2014 publication*

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2d TOTAL COMMUNITY MIX BY YEAR, BY TOTAL COMMUNITIES 2000 THROUGH 2014, FOR 2015 LZ 150



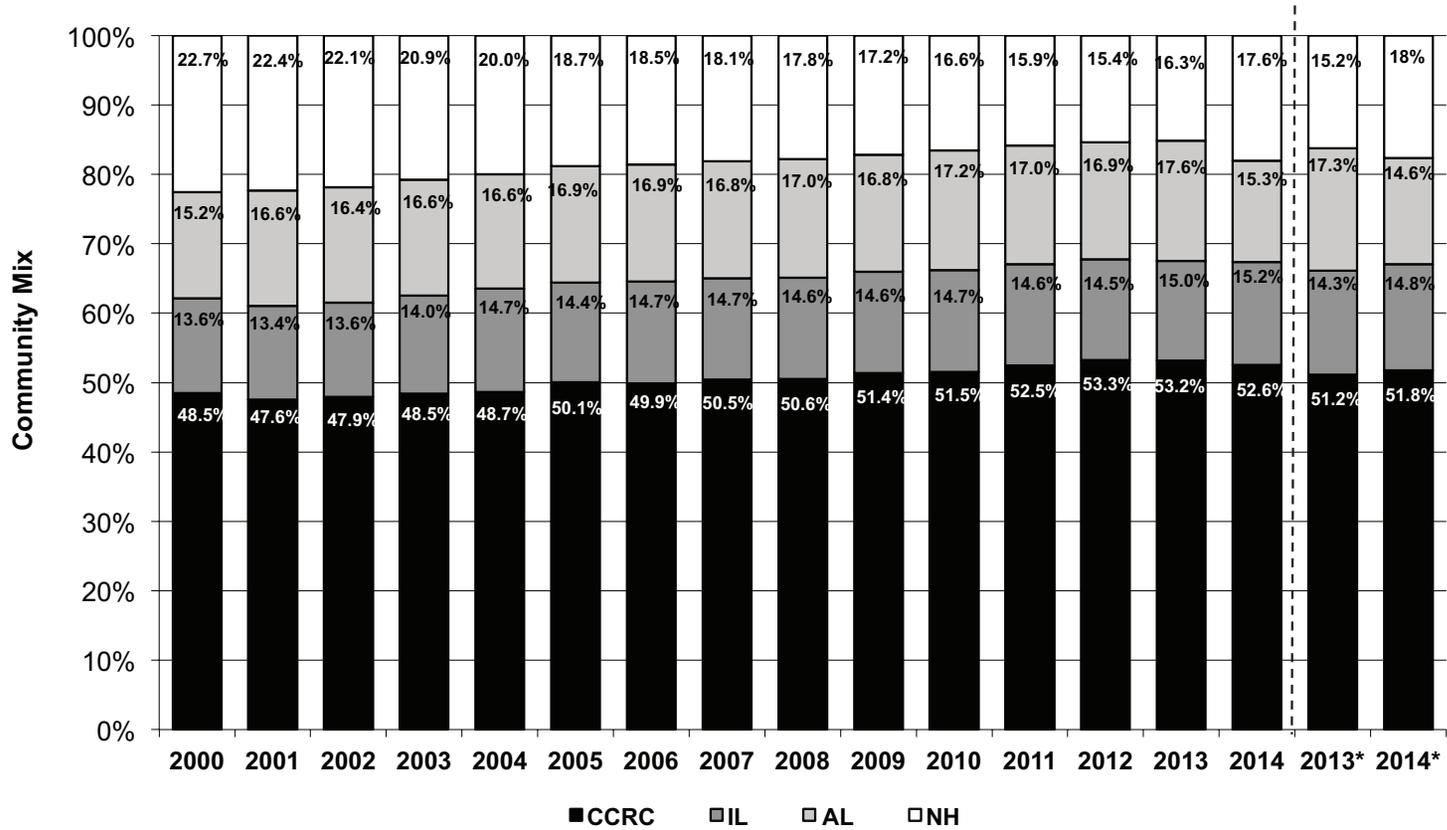
*Reflects change from 100 to 150 with the 2014 publication

LeadingAge 150 Ziegler

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2e TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2014, FOR 2015 LZ 150

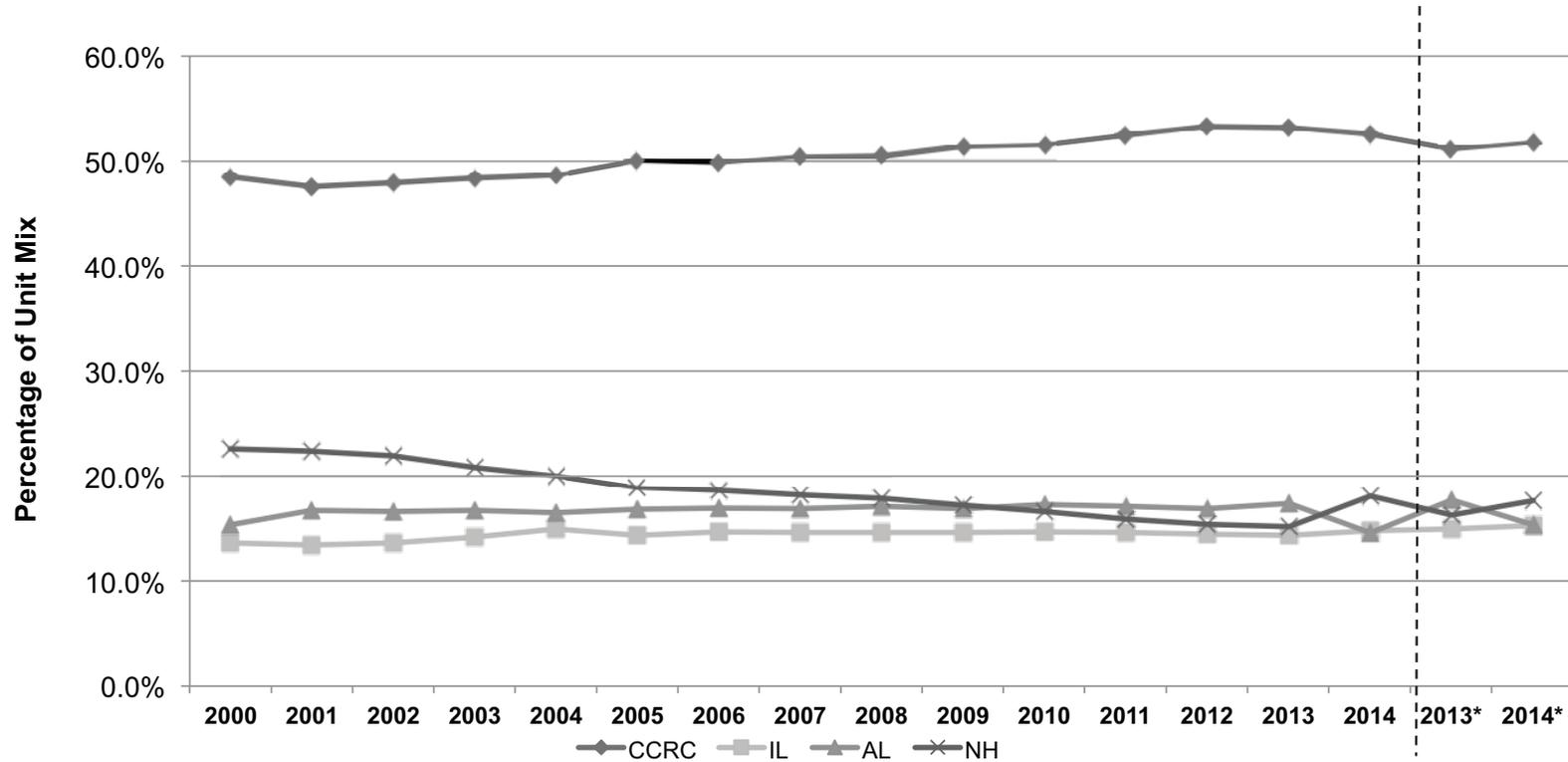


*Reflects change from 100 to 150 with the 2014 publication

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2f TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2014, FOR 2015 LZ 150

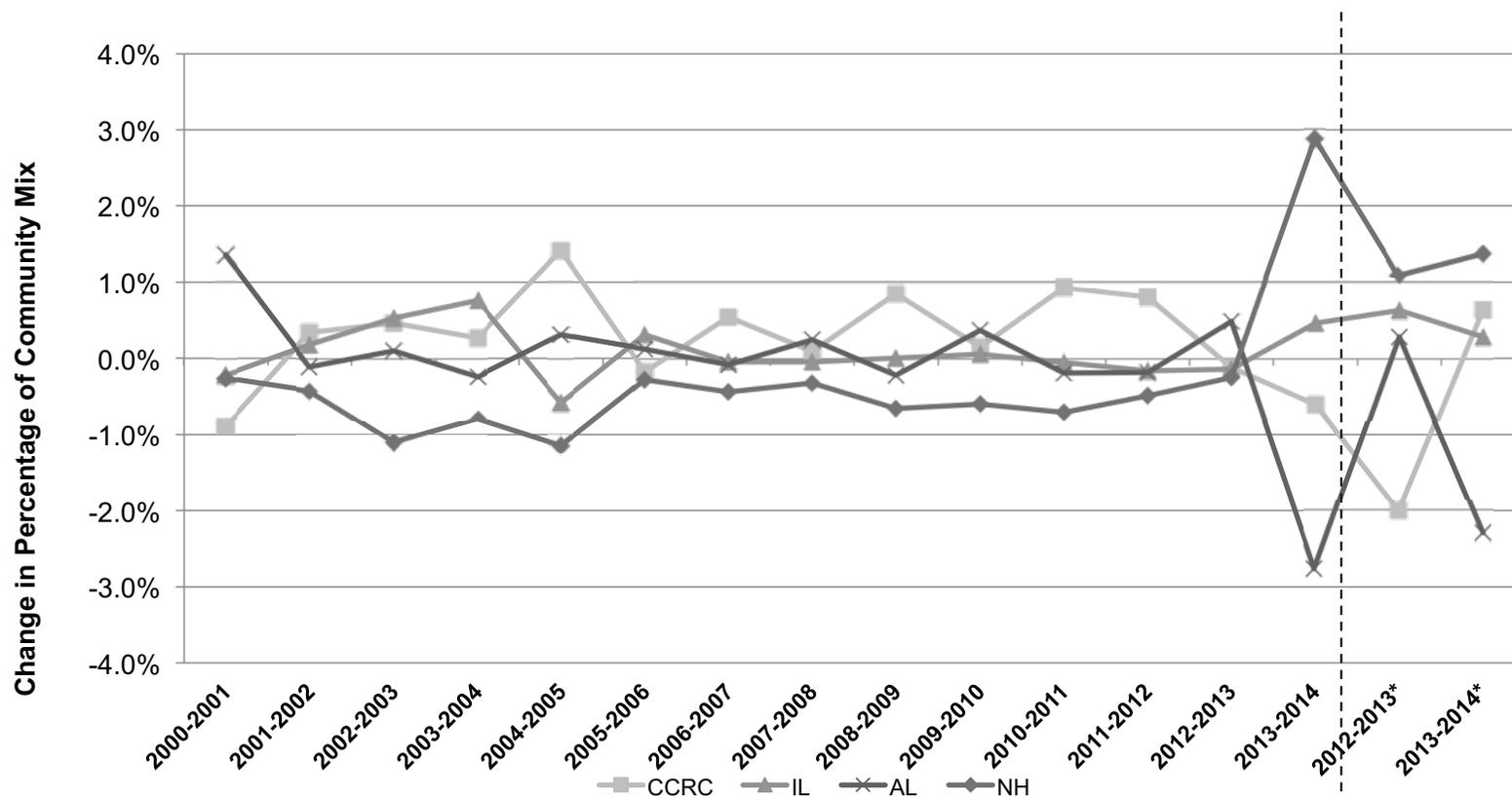


*Reflects change from 100 to 150 with the 2014 publication

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2g YEAR OVER YEAR CHANGE IN PERCENTAGE OF COMMUNITY MIX
2000 THROUGH 2014, FOR 2015 LZ 150

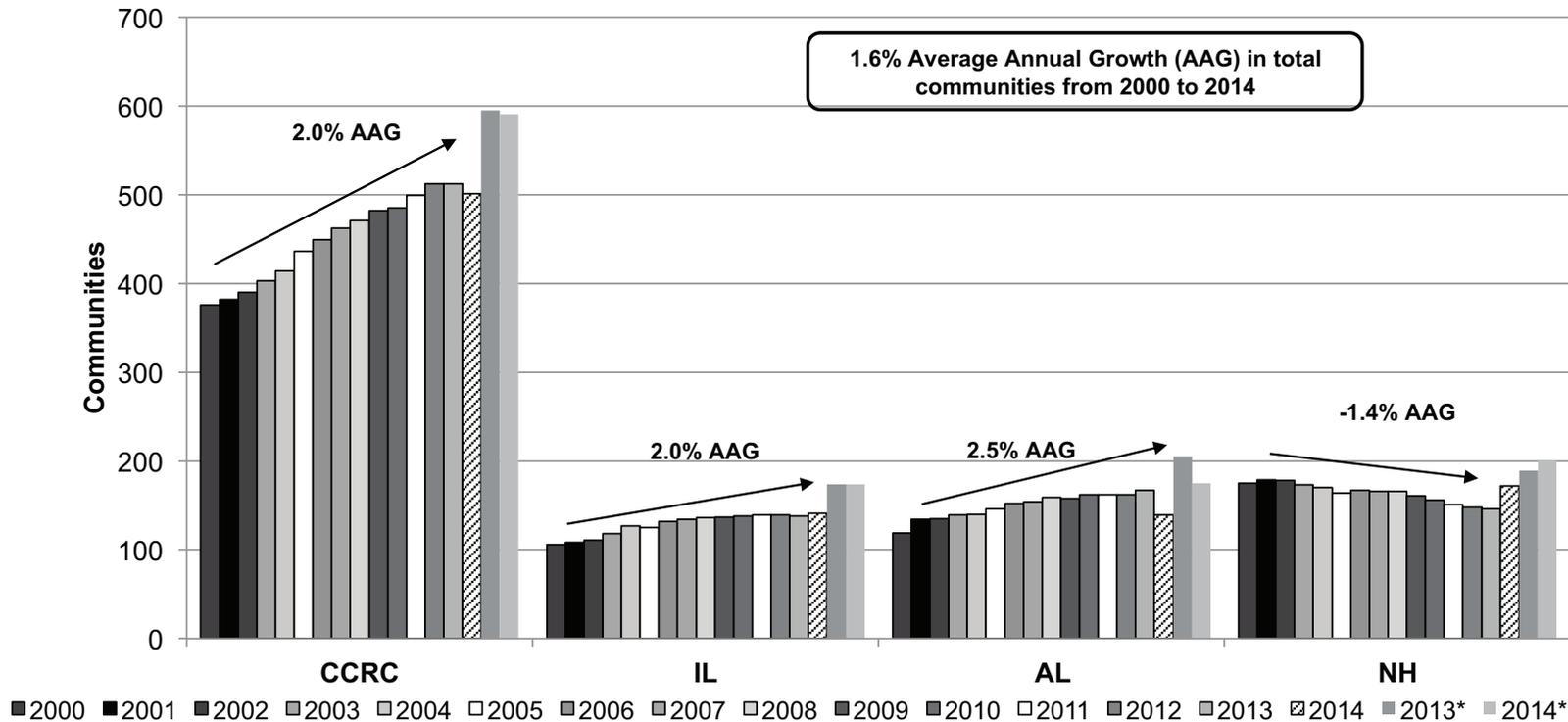


*Reflects change from 100 to 150 with the 2014 publication

4-2 2015 LeadingAge Ziegler 150

Organizational Characteristics: Communities

4-2h YEAR OVER YEAR CHANGE IN PERCENTAGE OF COMMUNITY MIX
2000 THROUGH 2014, FOR 2015 LZ 150

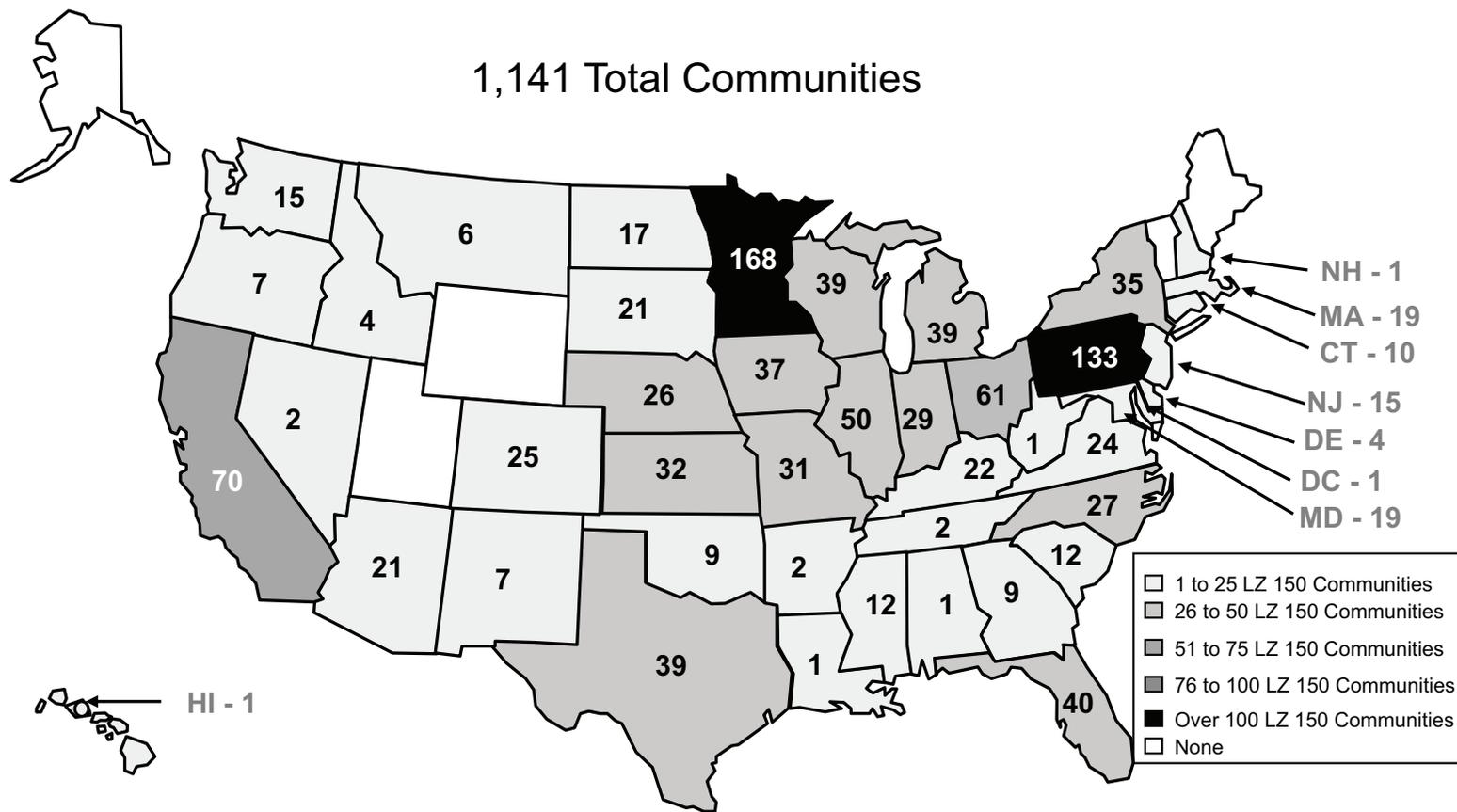


*Reflects change from 100 to 150 with the 2014 publication

4-3 2015 LeadingAge Ziegler 150

Organizational Characteristics: Locations

4-3a COMMUNITY LOCATIONS



4-3 2015 LeadingAge Ziegler 150

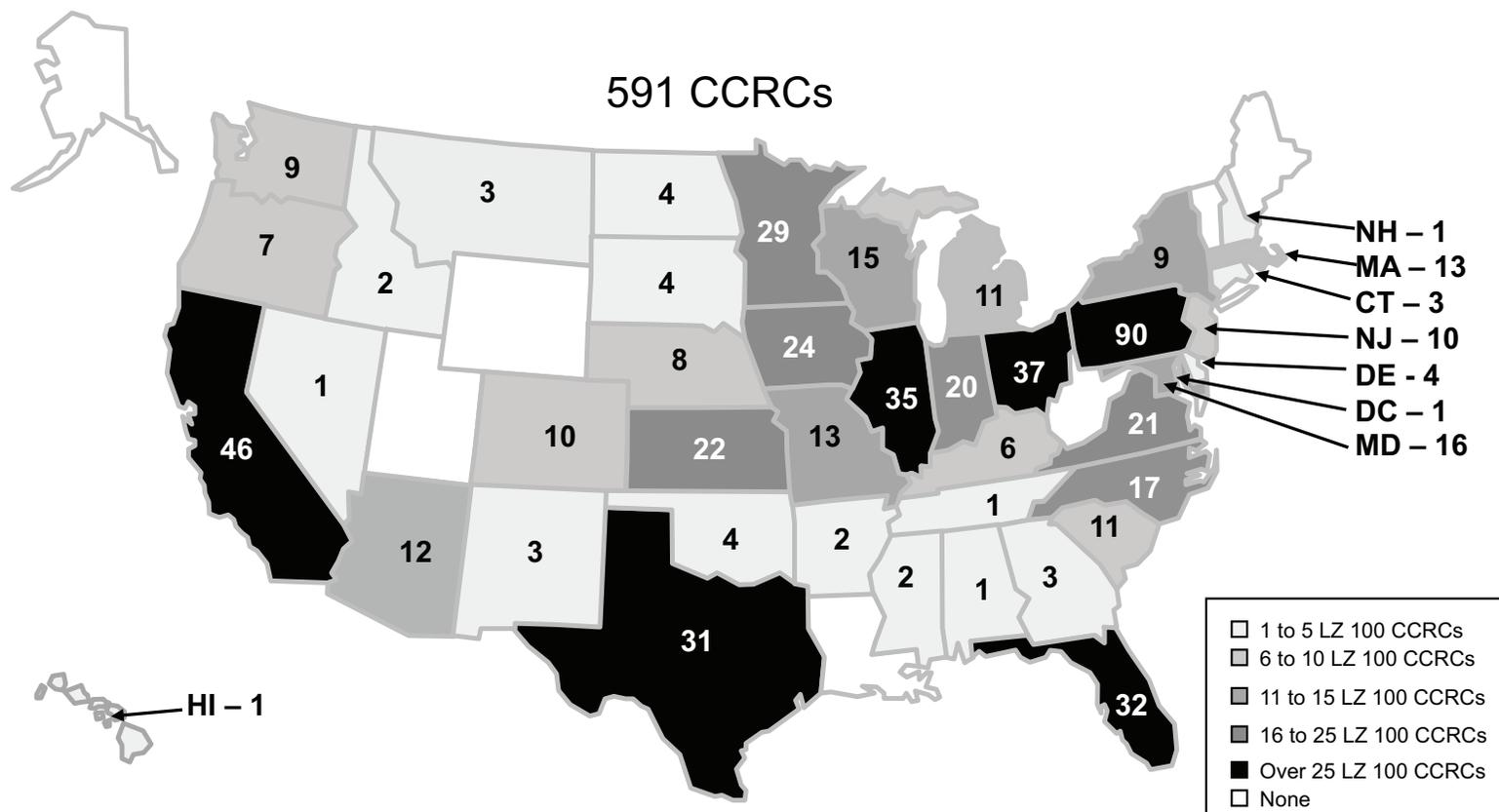
Organizational Characteristics: Locations 4-3b TOP FIVE STATES BY COMMUNITY TYPE

CCRC			IL		AL			NH		
1	PA	90	1	MN 40	1	MN	56	1	MN	43
2	CA	46	2	PA 19	2	PA	18	2	OH	13
3	OH	37	3	MI 16	3	WI	13	3	NY	11
4	IL	35	4	WI 15	4	NE	10	4	IA	9
5	FL	32	5	CA 12	5	CA, ND, SD, CO	8	5	NE, KS, MI	8

4-3 2015 LeadingAge Ziegler 150

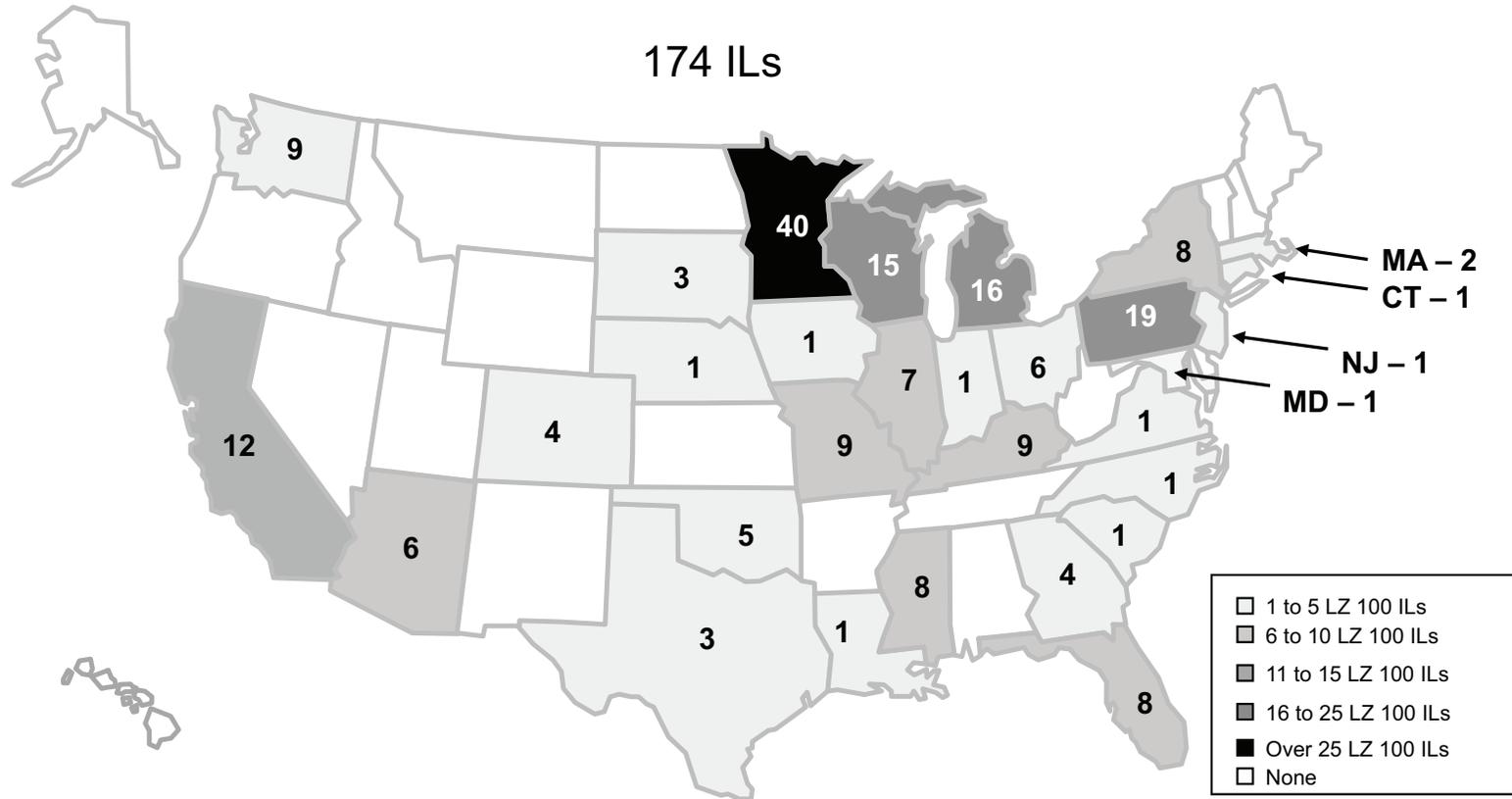
Organizational Characteristics: Locations

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



4-3 2015 LeadingAge Ziegler 150

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

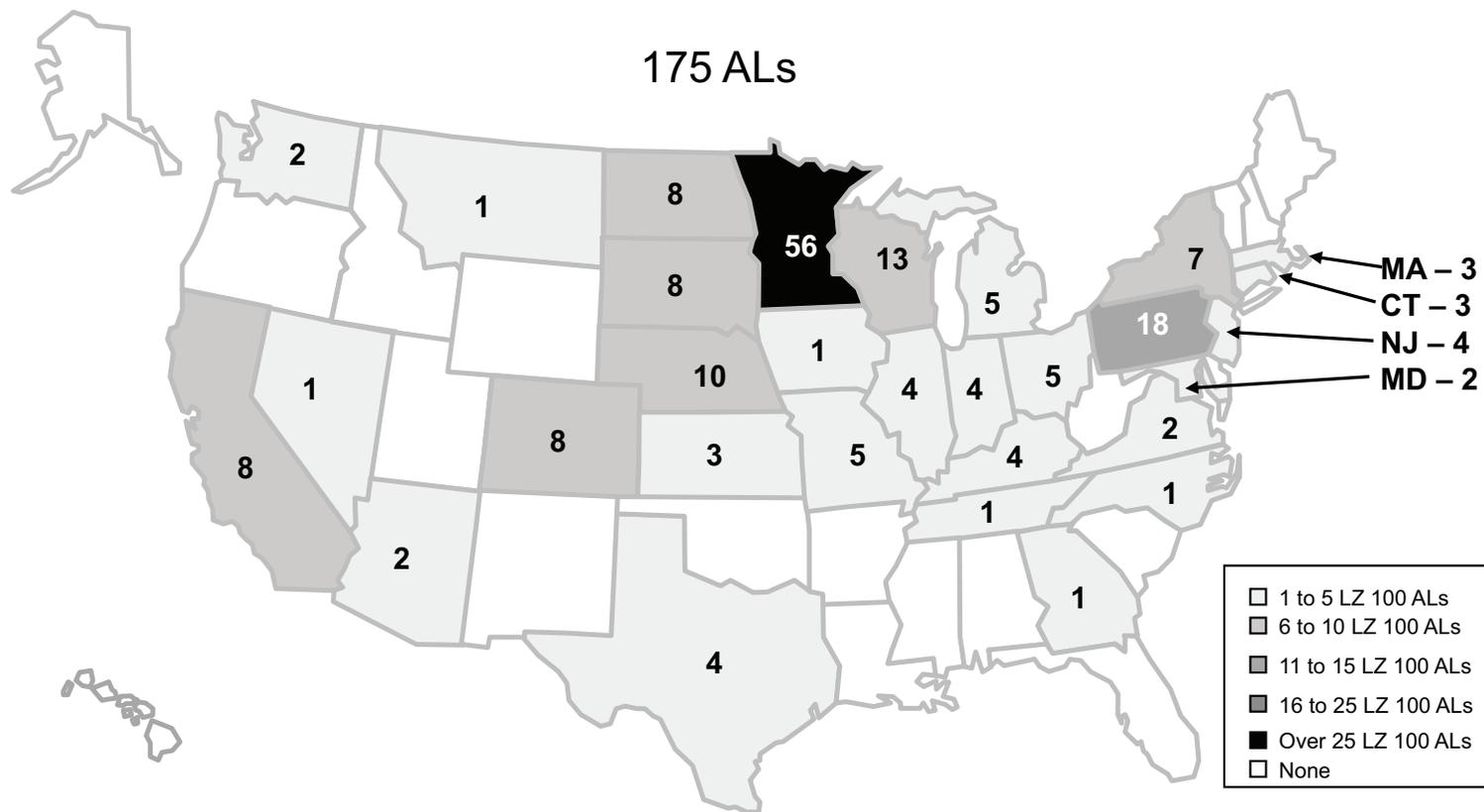


LeadingAge 150 Ziegler

4-3 2015 LeadingAge Ziegler 150

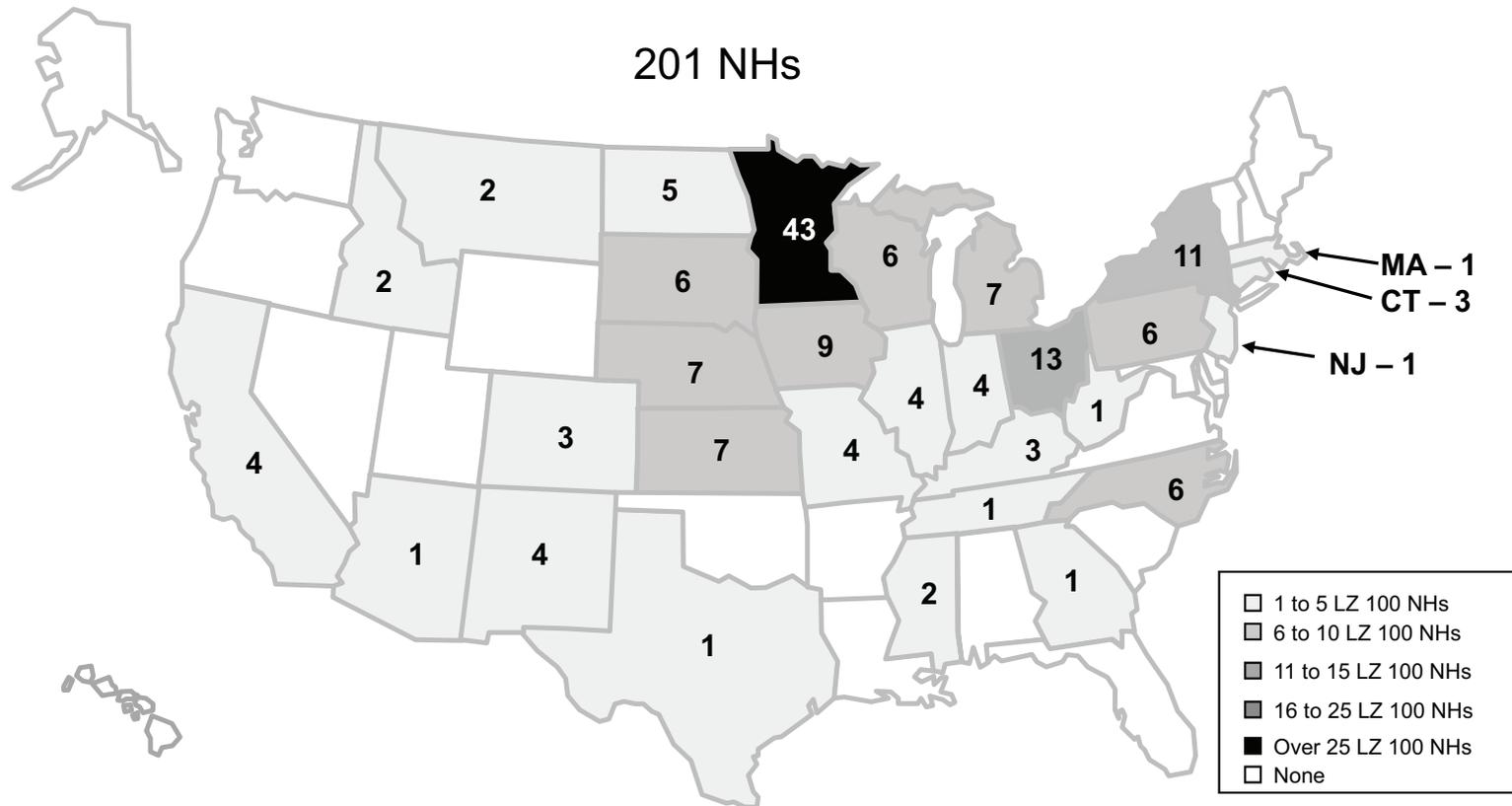
Organizational Characteristics: Locations

4-3e ASSISTED LIVING (AL) COMMUNITY LOCATIONS



4-3 2015 LeadingAge Ziegler 150

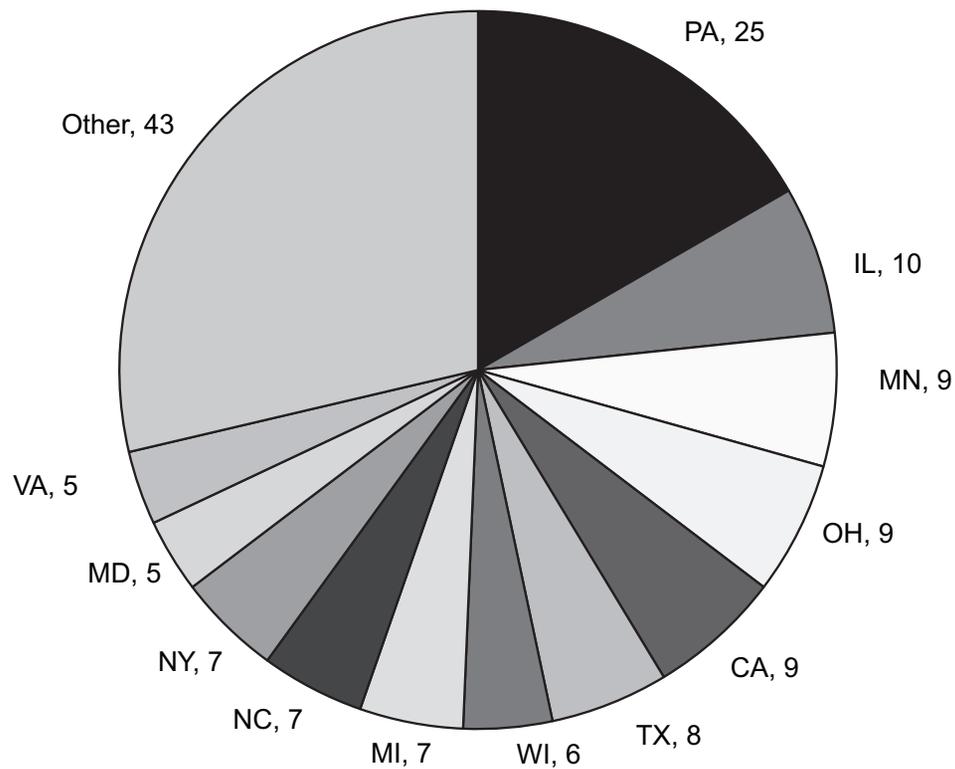
Organizational Characteristics: Locations
4-3f NURSING HOME (NH) LOCATIONS



4-4 2015 LeadingAge Ziegler 150

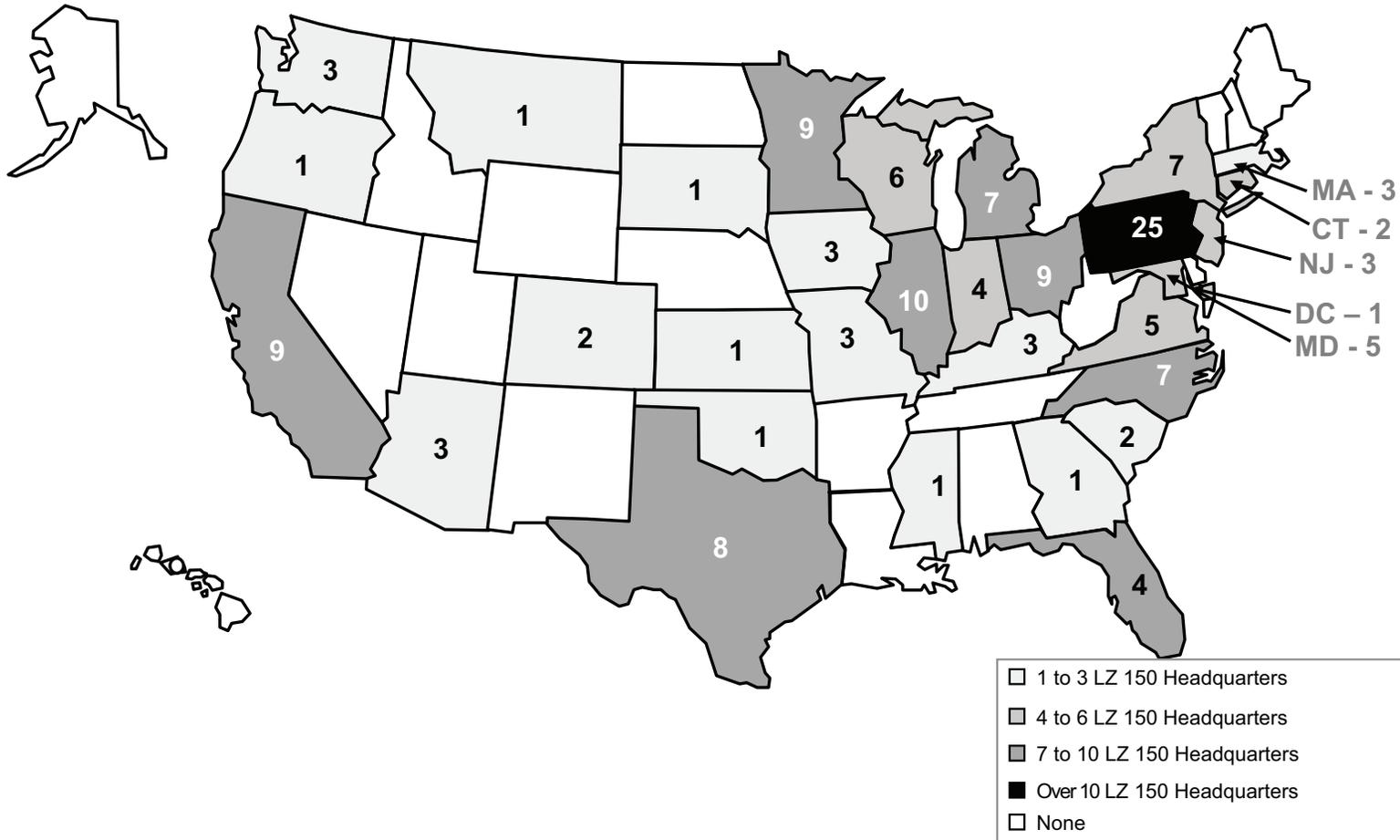
Organizational Characteristics: System Headquarters

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



4-4 2015 LeadingAge Ziegler 150

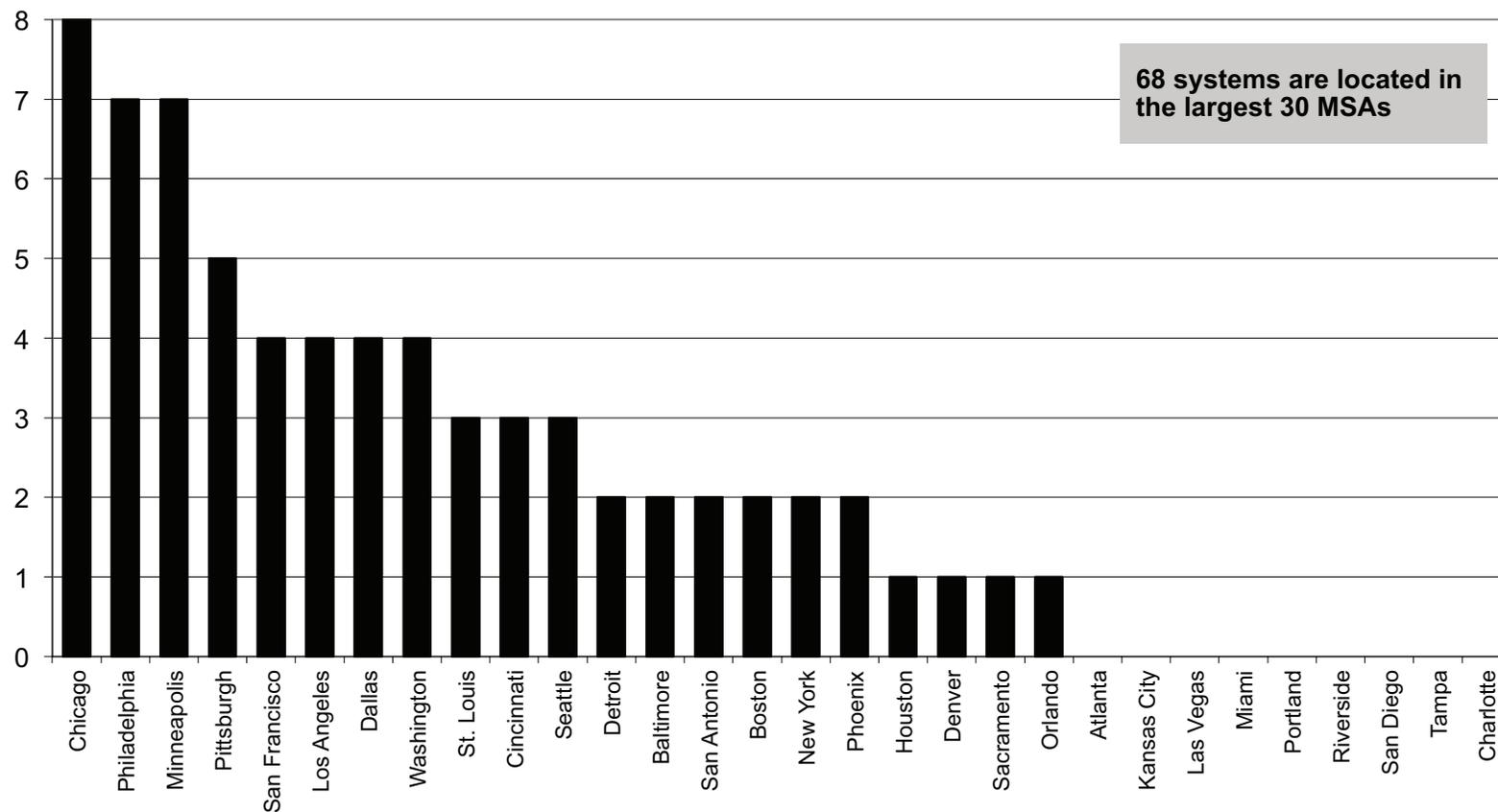
Organizational Characteristics: System Headquarters 4-4b HEADQUARTERS' LOCATIONS



4-5 2015 LeadingAge Ziegler 150

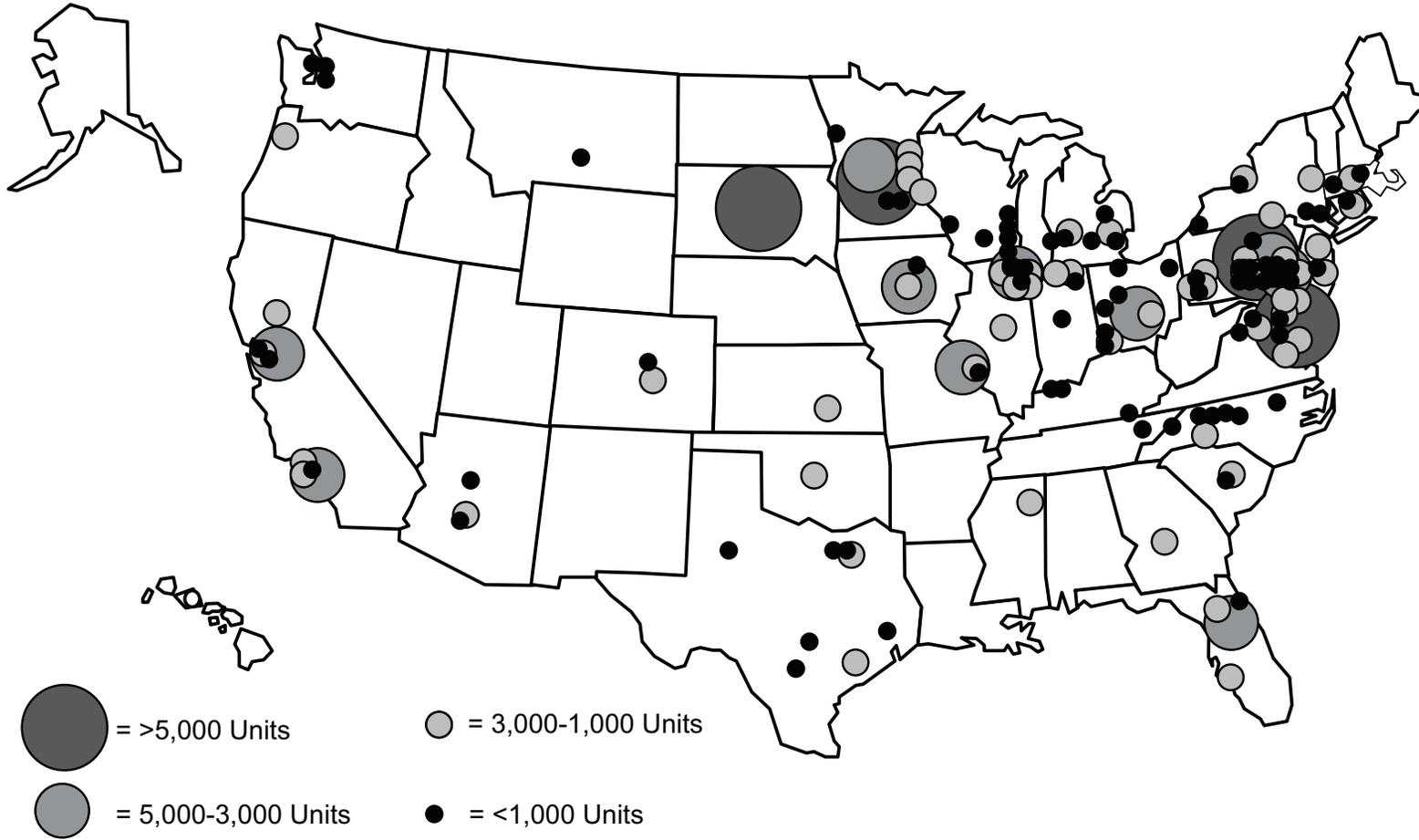
Organizational Characteristics: Metropolitan Statistical Areas (MSAs)

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



4-5 2015 LeadingAge Ziegler 150

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

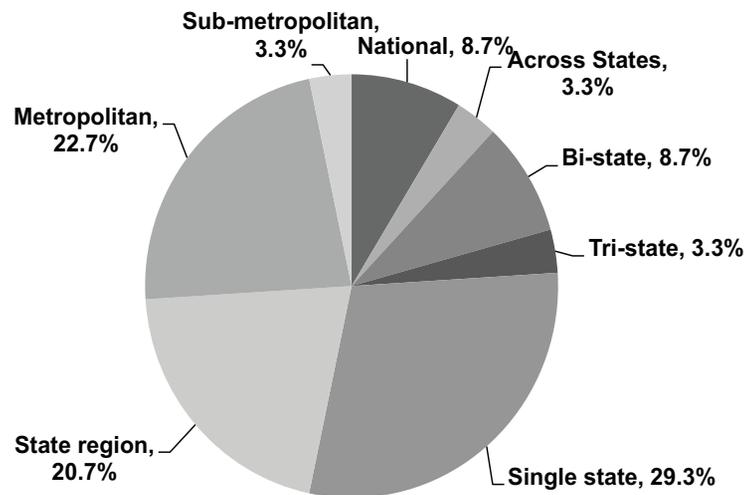


LeadingAge 150 Ziegler

4-6 2015 LeadingAge Ziegler 150

Organizational Characteristics: Geographic Classifications

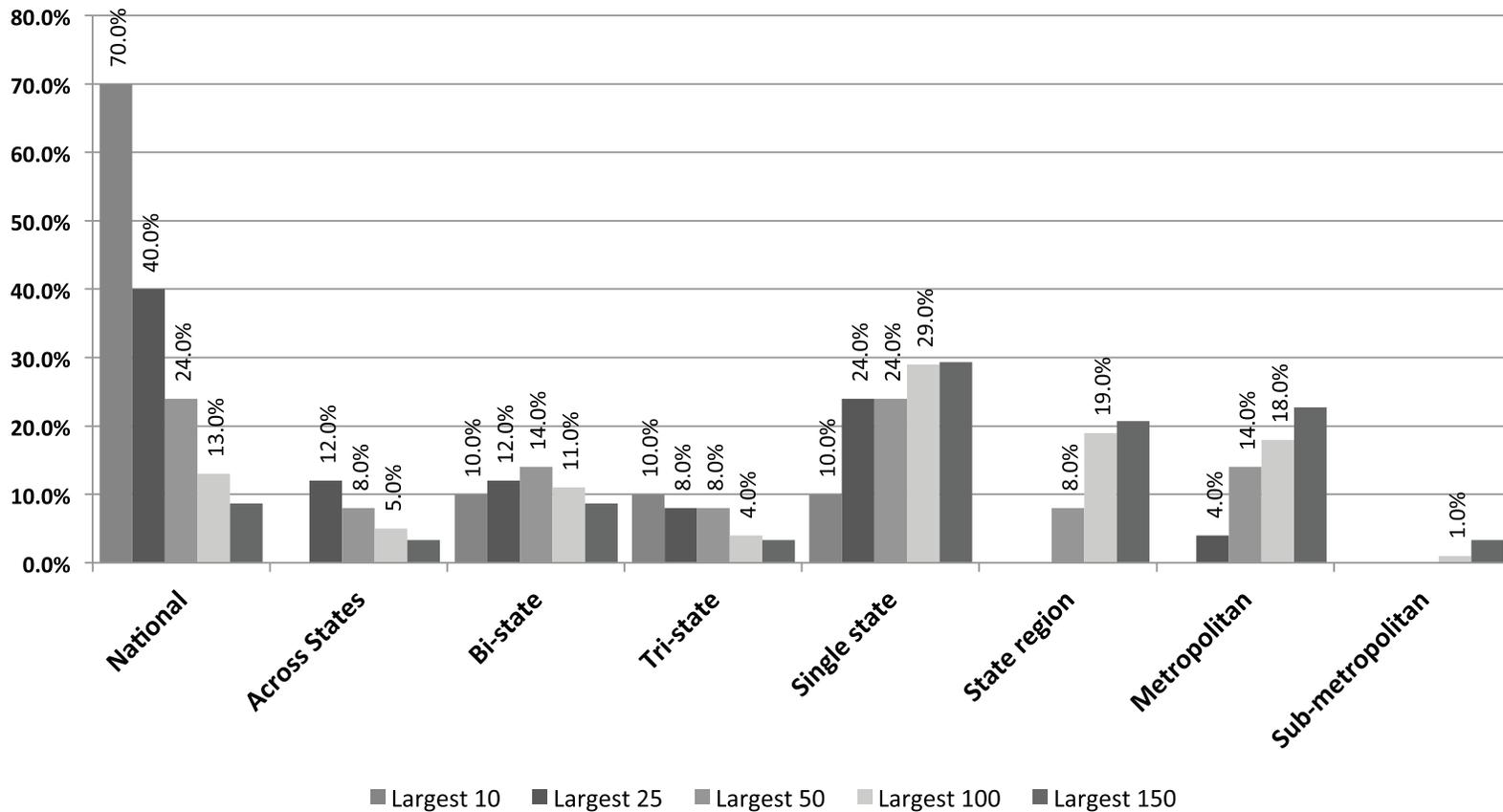
4-6a PRIMARY CLASSIFICATIONS



Primary Classification	Secondary Classification	# Organizations
National	Across states	2
	Bi-state	1
	Single-state	4
Across States	Single-state	3
	Metropolitan	1
Tri-state	Single-state	3
	Metropolitan	2
Bi-state	Single-state	3
	State region	4
	Metropolitan	6
Single-state	Sub-metropolitan	6
	State region	4
	Metropolitan	6
State region	Metropolitan	1
	Sub-metropolitan	2
Metropolitan	Sub-metropolitan	2
Total Organizations with Secondary Classifications		48

4-6 2015 LeadingAge Ziegler 150

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



4-7 2015 LeadingAge Ziegler 150

Organizational Characteristics: Corporate Name Changes

2015 Rank	Current System Name	Logo	Previous System Name
63	Integrace (MD)		EMA
73	Blue Skies of Texas (TX)		Air Force Villages
108	Christian Care Senior Living Communities		Christian Care Centers

4-8 2015 LeadingAge Ziegler 150

Organizational Characteristics: Debt Ratings

4-8a LZ 150 WITH RATED DEBT AS OF 12/31/2014

2015 Rank	System Name	State	Rated	
			S&P	Fitch
42	Buckner Retirement Services, Inc.	TX	A-	A
7	Lifespace Communities, Inc.	IA	NR	A
3	ACTS Retirement-Life Communities	PA	BBB+	A-
11	Westminster Communities of Florida	FL	NR	A-
49	Bethesda Health Group	PA	NR	A-
16	Asbury Communities	MD	NR	BBB
98	Givens Estates	NC	NR	BBB
77	Presby's Inspired Life	PA	NR	BBB
94	Goodwin House Incorporated	VA	NR	BBB
118	Wesley Homes	WA	BB+	BBB-
93	Los Angeles Jewish Home	CA	NR	BBB-
17	Christian Homes, Inc.	IL	NR	BBB-
26	Franciscan Communities, Inc.	IL	NR	BBB-
72	United Methodist Homes of New Jersey	NJ	NR	BBB-
75	Air Force Villages, Inc.	TX	NR	BBB-
106	Christian Care Centers	TX	NR	BBB-
99	Morningside Ministries	TX	NR	BBB-
14	Cornerstone Affiliates	CA	BBB	BBB+
5	Covenant Retirement Communities, Inc.	IL	BBB-	BBB+
39	Episcopal Senior Communities	CA	NR	BBB+
55	Masonicare, Inc.	CT	NR	BBB+
102	BHI Senior Living, Inc.	IN	NR	BBB+
146	United Methodist Retirement Communities, Inc.	MI	NR	BBB+
10	Lutheran Senior Services	MO	NR	BBB+

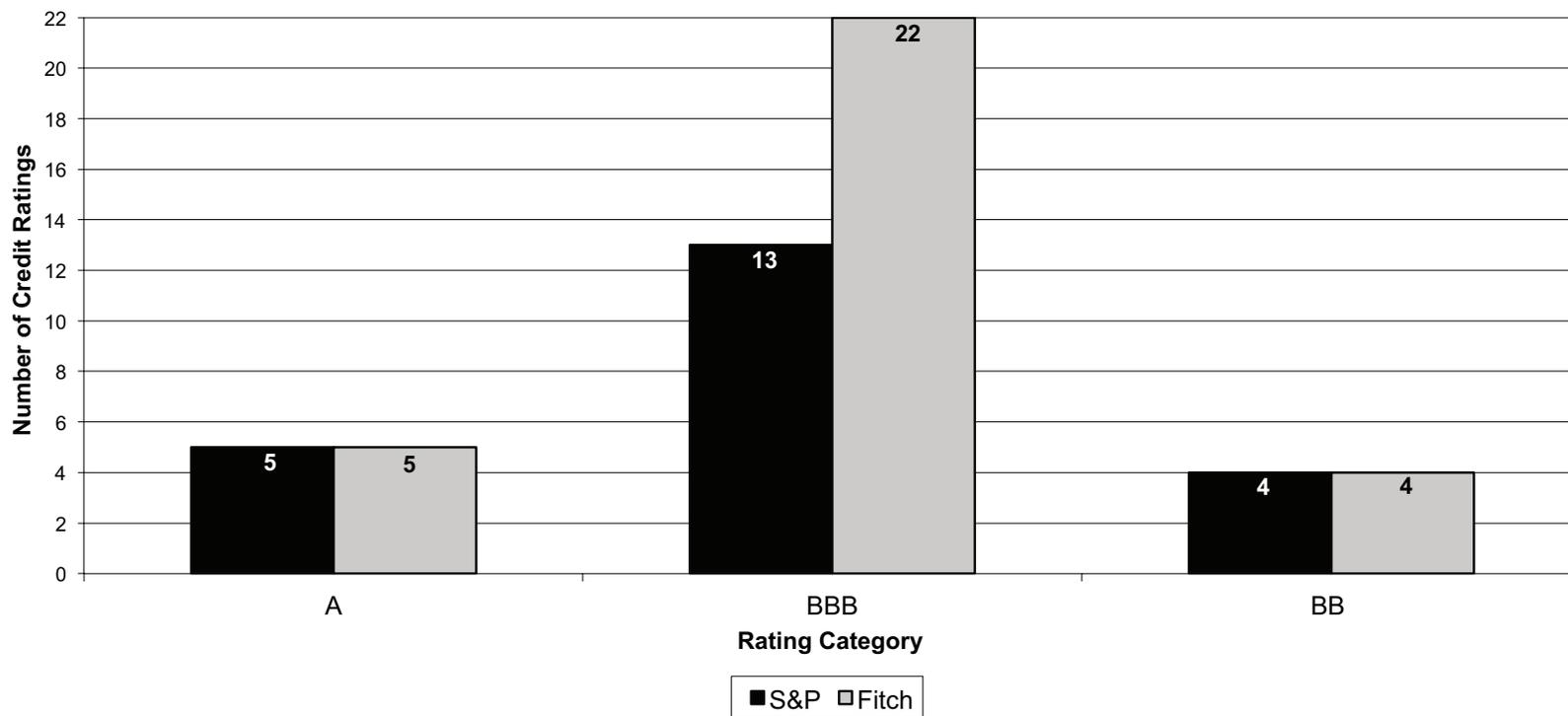
2015 Rank	System Name	State	Rated	
			S&P	Fitch
25	Springpoint Senior Living, Inc.	NJ	NR	BBB+
22	Diakon Lutheran Social Ministries	PA	NR	BBB+
12	Presbyterian Senior Living	PA	NR	BBB+
57	Friendship Senior Options	IL	NR	BB-
48	Greencroft Communities	IN	NR	BB+
46	Holland Home	MI	NR	BB+
52	Presbyterian Villages of Michigan	MI	NR	BB+
28	Otterbein Senior Lifestyle Choices	OH	A	NR
20	Masonic Villages	PA	A	NR
24	Willow Valley Communities	PA	A-	NR
31	Concordia Lutheran Ministries	PA	A+	NR
130	Christian Care Communities, Inc.	KY	BB-	NR
23	Shell Point	FL	BB+	NR
116	Lutheran Homes Society	OH	BB+	NR
37	Eskaton	CA	BBB	NR
68	Northern California Presbyterian Homes and Services, Inc.	CA	BBB	NR
107	Life Enriching Communities	OH	BBB	NR
108	Garden Spot Village	PA	BBB	NR
120	Messiah Lifeways	PA	BBB	NR
51	be.group	CA	BBB-	NR
132	The Loomis Communities	MA	BBB-	NR
13	Ohio Presbyterian Retirement Services	OH	BBB-	NR
15	Front Porch Communities and Services	CA	BBB+	NR
1	Evangelical Lutheran Good Samaritan Society	SD	BBB+	NR

NR: No rating exists for that particular rating agency

4-8 2015 LeadingAge Ziegler 150

Organizational Characteristics: Debt Ratings

4-8b RATINGS BY CATEGORY



45 ratings in "A" & "BBB" Category
 8 in "BB" Category
 53 total ratings of debt for 48 organizations

4-9 2015 LeadingAge Ziegler 150

Analysis of the Data: Revenues

4-9a ANNUAL REVENUE BY ORGANIZATION

2015 Rank	System Name	State	Annual Revenue Tier
1	National Senior Campuses	MD	Tier I
2	Evangelical Lutheran Good Samaritan Society	SD	Tier I
3	ACTS Retirement-Life Communities	PA	Tier I
4	Presbyterian Homes and Services	MN	Tier I
5	Covenant Retirement Communities, Inc.	IL	Tier I
7	Lifespace Communities, Inc.	IA	Tier I
8	The Kendal Corporation	PA	Tier I
11	Presbyterian Senior Living	PA	Tier I
12	Cornerstone Affiliates	CA	Tier I
15	Pacific Retirement Services	OR	Tier I
19	Diakon Lutheran Social Ministries	PA	Tier I
30	National Church Residences	OH	Tier I
36	Hebrew SeniorLife	MA	Tier I
38	Jewish Home Lifecare	NY	Tier I
9	Lutheran Senior Services	MO	Tier II
10	Westminster Communities of Florida	FL	Tier II
13	Ecumen	MN	Tier II
14	Ohio Presbyterian Retirement Services	OH	Tier II
16	Front Porch Communities and Services	CA	Tier II
17	Asbury Communities	MD	Tier II
18	Presbyterian Manors of Mid-America, Inc.	KS	Tier II
20	Masonic Villages of the Grand Lodge of Pennsylvania	PA	Tier II
21	Volunteers of America	VA	Tier II
22	Christian Homes, Inc.	IL	Tier II
23	Shell Point	FL	Tier II

2015 Rank	System Name	State	Annual Revenue Tier
25	Springpoint Senior Living, Inc.	NJ	Tier II
26	Franciscan Communities, Inc.	IL	Tier II
27	Augustana Care	MN	Tier II
28	Concordia Lutheran Ministries	PA	Tier II
33	Elim Care, Inc.	MN	Tier II
39	Eskaton	CA	Tier II
40	Episcopal Senior Communities	CA	Tier II
42	Loretto	NY	Tier II
44	Presbyterian Homes	IL	Tier II
47	Holland Home	MI	Tier II
53	Lutheran Life Ministries (fka Lutheran Life Communities)	IL	Tier II
54	Masonicare, Inc.	CT	Tier II
59	Phoebe Ministries	PA	Tier II
65	Presbyterian SeniorCare	PA	Tier II
67	Lutheran SeniorLife	PA	Tier II
93	Los Angeles Jewish Home	CA	Tier II
103	Lutheran Social Services of Michigan	MI	Tier II
24	Willow Valley Communities	PA	Tier III
29	Senior Quality Lifestyles Corporation	TX	Tier III
31	Otterbein Senior Lifestyle Choices	OH	Tier III
34	Homewood Retirement Centers	MD	Tier III
35	Providence Life Services	IL	Tier III
37	Buckner Retirement Services, Inc.	TX	Tier III
43	Bethesda Senior Living Communities	CO	Tier III
45	Mississippi Methodist Senior Services, Inc.	MS	Tier III

N/A: Revenue data unavailable

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

4-9 2015 LeadingAge Ziegler 150

Analysis of the Data: Revenues

4-9a ANNUAL REVENUE BY ORGANIZATION

2015 Rank	System Name	State	Annual Revenue Tier
46	WesleyLife	IA	Tier III
48	Greencroft Communities	IN	Tier III
49	Bethesda Health Group, Inc.	MO	Tier III
50	be.group	CA	Tier III
51	Wesley Enhanced Living	PA	Tier III
55	Lutheran Services Carolinas	NC	Tier III
56	Presbyterian Villages of Michigan	MI	Tier III
58	Virginia United Methodist Homes, Inc.	VA	Tier III
57	SantaFe Senior Living	FL	Tier III
60	Friendship Senior Options	IL	Tier III
61	American Baptist Homes of the Midwest	MN	Tier III
62	Virginia Baptist Homes	VA	Tier III
63	Integrace (Formerly EMA)	MD	Tier III
64	Lutheran Social Services of South Central Pennsylvania	PA	Tier III
68	United Methodist Homes	NY	Tier III
70	Lutheran Homes of South Carolina	SC	Tier III
71	United Methodist Homes of New Jersey	NJ	Tier III
74	United Church Homes, Inc.	OH	Tier III
75	Presby's Inspired Life	PA	Tier III
76	The Presbyterian Homes, Inc.	NC	Tier III
77	United Church Homes and Services	NC	Tier III
78	Northern California Presbyterian Homes and Services, Inc.	CA	Tier III
79	The United Methodist Retirement Homes, Inc.	NC	Tier III
81	Liberty Lutheran Services	PA	Tier III
83	Westminster Ingleside Retirement Communities	DC	Tier III

2015 Rank	System Name	State	Annual Revenue Tier
85	Eventide	MN	Tier III
86	St. Ann's Community	NY	Tier III
89	Presbyterian Communities and Services	TX	Tier III
90	Christian Care Communities, Inc.	KY	Tier III
92	Goodwin House Incorporated	VA	Tier III
96	Heritage Ministries	NY	Tier III
100	The Ohio Masonic Home	OH	Tier III
102	United Church of Christ Homes	PA	Tier III
110	Christian Living Ventures (formerly Christian Living Communities)	CO	Tier III
113	Wellspring Lutheran Services	MI	Tier III
116	Lutheran Homes Society	OH	Tier III
120	St. Andrew's Resources for Seniors System	MO	Tier III
124	Lutheran Social Ministries of New Jersey	NJ	Tier III
132	LindenGrove, Inc.	WI	Tier III
136	Porter Hills	MI	Tier III
140	Lutheran Social Services of the South, Inc.	TX	Tier III
142	Sholom Community Alliance	MN	Tier III
146	Albright Care Services	PA	Tier III
145	United Methodist Retirement Communities, Inc.	MI	Tier III
6	Retirement Housing Foundation	CA	Tier IV
32	Christian Care Companies	AZ	Tier IV
41	Magnolia Manor	GA	Tier IV
52	Baptist Village Communities	OK	Tier IV
66	United Methodist Memorial Home	IN	Tier IV
72	Elant	NY	Tier IV

N/A: Revenue data unavailable

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

4-9 2015 LeadingAge Ziegler 150

Analysis of the Data: Revenues

4-9a ANNUAL REVENUE BY ORGANIZATION

2015 Rank	System Name	State	Annual Revenue Tier
73	Blue Skies (fka Air Force Villages, Inc.)	TX	Tier IV
80	Menno Haven	PA	Tier IV
84	Oakwood Lutheran Senior Ministries	WI	Tier IV
87	Living Branches	PA	Tier IV
88	Presbyterian Communities of South Carolina	SC	Tier IV
91	Simpson Senior Services	PA	Tier IV
94	Luthercare	PA	Tier IV
95	Givens Estates	NC	Tier IV
97	Cedar Community	WI	Tier IV
98	BHI Senior Living, Inc.	IN	Tier IV
99	Western Home Communities	IA	Tier IV
101	Morningside Ministries	TX	Tier IV
104	Sunnyside Presbyterian Home, Inc.	VA	Tier IV
105	Life Enriching Communities	OH	Tier IV
106	Methodist Retirement Communities	TX	Tier IV
108	Christian Care Senior Living Communities (fka Christian Care Centers)	TX	Tier IV
107	Garden Spot Village	PA	Tier IV
109	Sun Health Senior Living, LLC	AZ	Tier IV
111	Mather LifeWays	IL	Tier IV
112	Landis Communities	PA	Tier IV
114	Luther Manor	WI	Tier IV
115	Wesley Willows	IL	Tier IV
117	Saint Therese	MN	Tier IV
118	Episcopal SeniorLife Communities	NY	Tier IV
119	Wesley Homes	WA	Tier IV
122	Masonic Homes of Kentucky	KY	Tier IV

2015 Rank	System Name	State	Annual Revenue Tier
121	CRISTA Senior Living	WA	Tier IV
125	Lutheran Life Villages	IN	Tier IV
123	Messiah Lifeways	PA	Tier IV
128	National Lutheran Communities & Services	MD	Tier IV
129	Maple Knoll Communities, Inc.	OH	Tier IV
130	LifeStream Complete Senior Living, Inc.	AZ	Tier IV
133	The Loomis Communities	MA	Tier IV
134	Sunset Retirement Communities and Services	MI	Tier IV
135	Deaconess Abundant Life Communities	MA	Tier IV
137	Baptist Retirement Homes of North Carolina, Inc.	NC	Tier IV
138	Smith Senior Living	IL	Tier IV
139	Shepherd of the Valley Lutheran Retirement Services	OH	Tier IV
141	St. John's Lutheran Ministries	MT	Tier IV
143	Baptist Homes Society	PA	Tier IV
144	Friends Homes, Inc.	NC	Tier IV
147	Masonic Homes of California	CA	Tier IV
149	Baptist Life Communities	KY	Tier IV
148	Life Care Pastoral Services	FL	Tier IV
69	Walker Methodist	MN	Tier V
126	Vincentian Collaborative System	PA	Tier V
127	Presbyterian Retirement Communities Northwest	WA	Tier V
104	Methodist Retirement Communities	TX	Tier V
127	United Methodist Homes	CT	Tier V
82	VMP	WI	N/A
131	United Methodist Homes	CT	N/A
150	Bethany Lutheran Homes	WI	N/A

N/A: Revenue data unavailable

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

4-9 2015 LeadingAge Ziegler 150

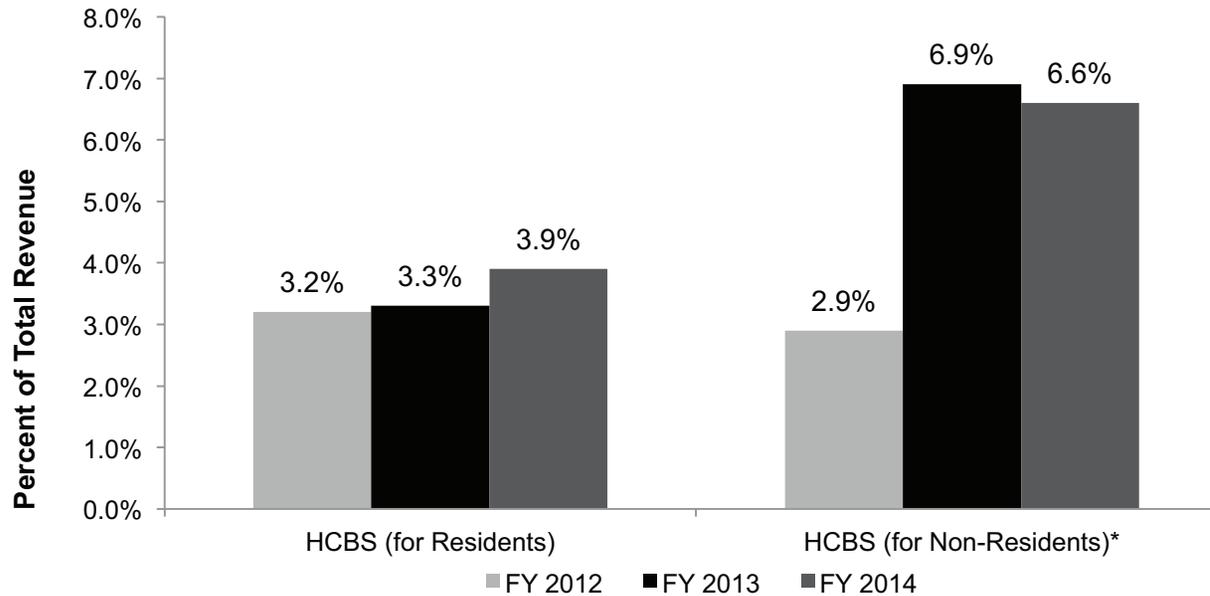
Analysis of the Data: Revenues

4-9b ANNUAL REVENUE BY ORGANIZATION

	Number of LZ 150 Organizations	% of total LZ 150
Tier I: > \$200 million	14	9.5%
Tier II: \$100-\$199 million	28	19.0%
Tier III: \$50-\$99 million	52	35.4%
Tier IV: \$25-\$49 million	50	34.0%
Tier V: < \$25 million	5	3.4%

Analysis of the Data: Revenues

4-9c AVERAGE REVENUE FOR HCBS



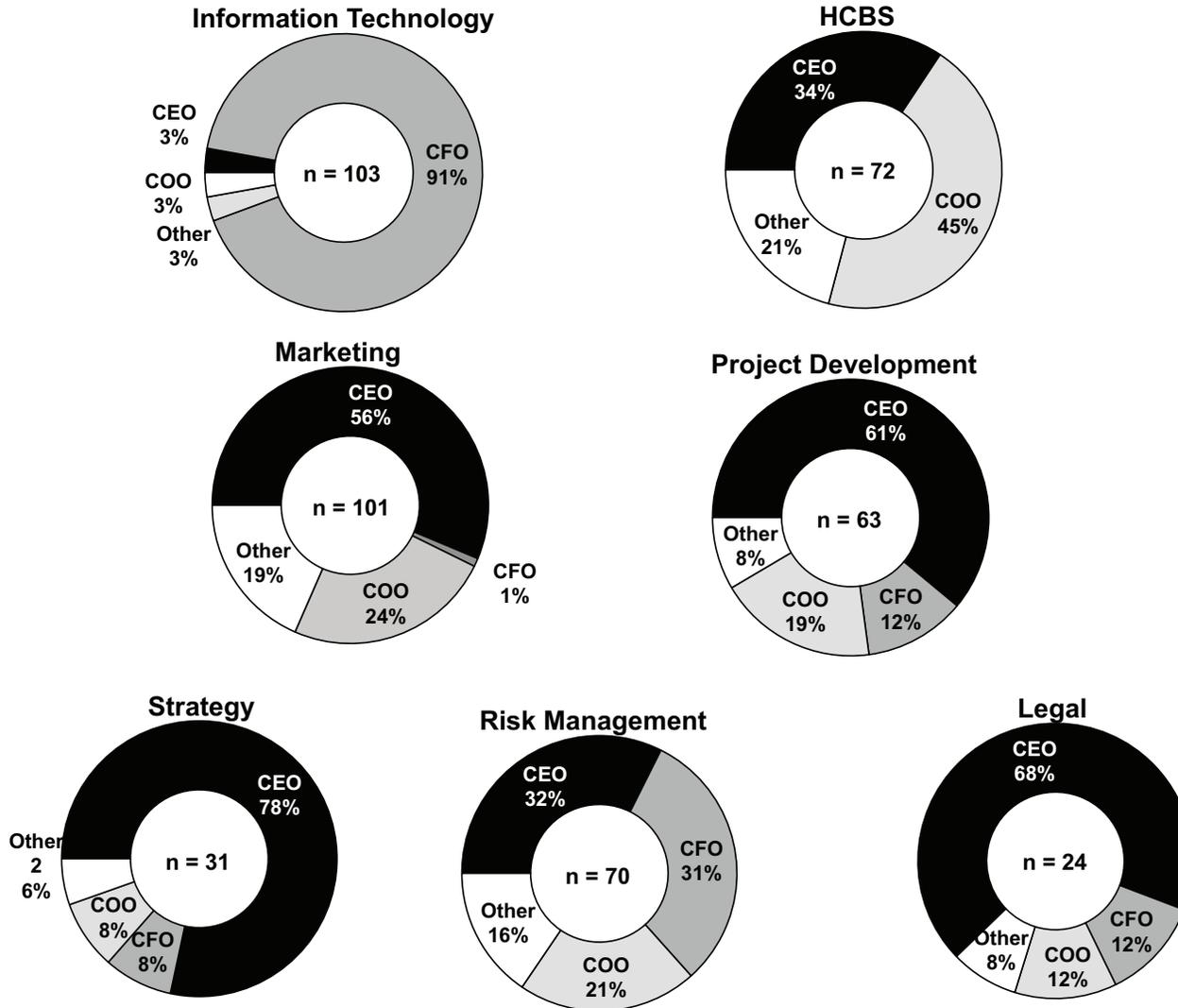
*Note that several providers with significant revenue from off-campus HCBS are inflating the average.

Median figure for off-campus HCBS among the LZ 150 is 4%.

4-10 2015 LeadingAge Ziegler 150

Analysis of the Data: Corporate Structure

4-10a 2015 LZ 150 CORPORATE LEVEL POSITIONS, BY AREA AND REPORTING EXECUTIVE

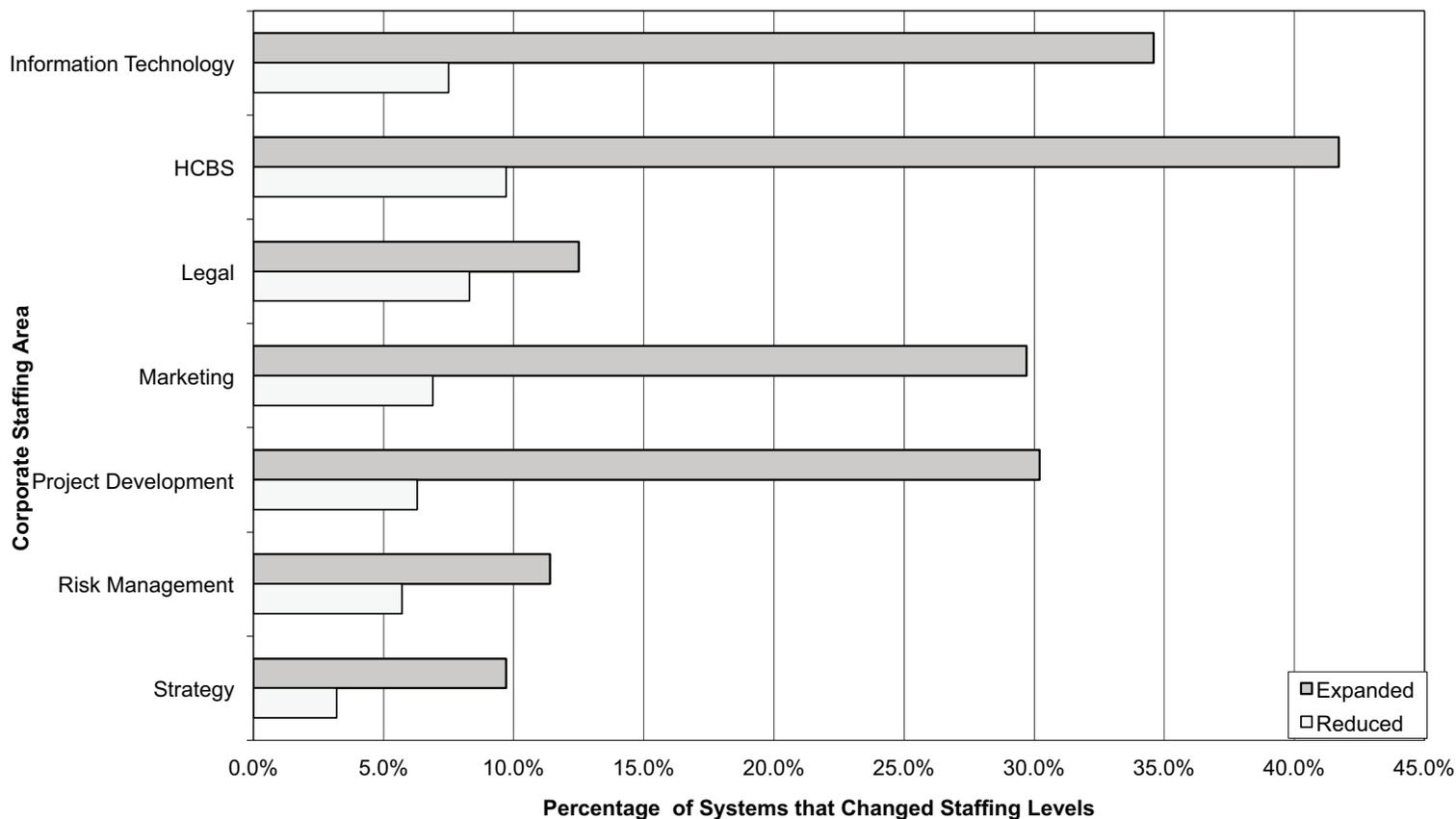


Individual n's represent the number of systems that have a position for each area.

4-10 2015 LeadingAge Ziegler 150

Analysis of the Data: Corporate Structure

4-10b 2015 LZ 150 CHANGE IN CORPORATE STAFFING, BY AREA



4-10 2015 LeadingAge Ziegler 150

Analysis of the Data: Corporate Structure

4-10c 2015 LZ 150 CORPORATE STAFFING CHANGES

2015 Rank	System Name	State	Current (2014)	Previous
CEO				
3	ACTS Retirement-Life Communities	PA	J. Mark Vanderbeck	Marvin Mashner
30	National Church Residences	OH	Mark Ricketts	Thomas Slemmer
47	Holland Home	MI	Mina Breuker	H. David Claus
62	Virginia Baptist Homes, Inc.	VA	Jonathan Cook	Randall Robinson
70	Lutheran Homes of South Carolina, Inc.	SC	Frank T. Shepke	Thomas E Brown, Jr., DPH
78	Northern California Presbyterian Homes & Services	CA	David Berg	Barbara Hood
86	St. Ann's Community	NY	Michael McRae	Elizabeth Mullin DiProsa
98	BHI Senior Living, Inc.	IN	John Dattilo	Richard Keenan
103	Lutheran Social Services of Michigan	MI	Sam Beals	Mark Stutrud
114	Luther Manor	WI	Stephanie Chedid	David Keller
116	Lutheran Homes Society, Inc.	OH	William R. Marshall	David I. Roberts
124	Lutheran Social Ministries of New Jersey, Inc.	NJ	Colleen Frankenfield	Phil Harrington
132	LindenGrove, Inc.	WI	Linda Erickson-Joel	Robert Schaefer
135	Deaconess Abundant Life Communities	MA	Christopher Sintros	Rev. Herbert Taylor
CFO				
3	ACTS Retirement-Life Communities	PA	Karen Christiansen	Gerald Grant
19	Diakon Lutheran Social Ministries	PA	Scott Habecker	Richard Barger
38	Jewish Home Lifecare	NY	Robert Davis	Vacant
54	Masonicare	CT	James Rude	Scott Thelen
106	Methodist Retirement Communities	TX	Don Stephens	Brad Stewart
112	Landis Communities	PA	Eric Bender	Carolyn Burke
125	Lutheran Life Ministries	IL	Lori Fedyk	Carl Moellenkamp
134	Sunset Retirement Communities and Services	MI	Steven Bossenbroek	Steven Zuiderveen
135	Deaconess Abundant Life Communities	MA	James McGowan	Susan Shakoar
145	United Methodist Retirement Communities, Inc.	MI	Steve Fetyko	Mark Royce
COO				
47	Holland Home	MI	Troy Vugteveen	Mina Breuker
75	Presby's Inspired Life	PA	Tama Carey	Jim Polaski
100	The Ohio Masonic Home	OH	Brian Gibboney	Jay Dettorre
107	Garden Spot Village	PA	Steve Muller	John Farber
109	Christian Living Ventures	CO	Cindy Hogan	Camille Thompson
124	Lutheran Social Ministries of New Jersey, Inc.	NJ	Vacant	Peg Bucci
140	Lutheran Social Services of the South, Inc.	TX	Michael Loo	Betsy Guthrie

4-11 2015 LeadingAge Ziegler 150

Analysis of the Data: Corporate Structure

4-10d CORPORATE TENURE

Position	Average Tenure (years)	n*
CEO	10.80	150
CFO	8.97	128
COO	6.03	99
CIO	6.54	47

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

Organizational Characteristics: Accreditation

4-11a LZ 150 WITH ACCREDITED COMMUNITIES

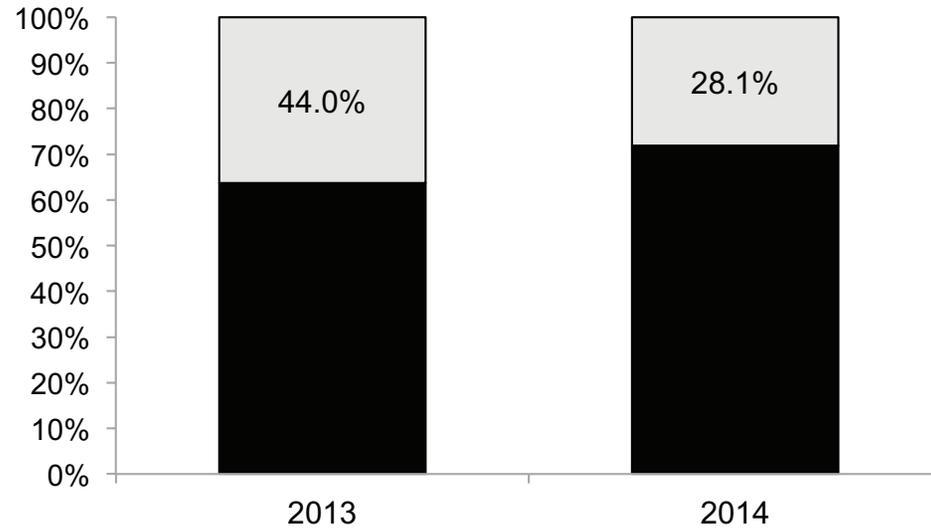
2015 Rank	System Name	State	Accreditation	
			CARF-CCAC	JCAHO
3	ACTS Retirement-Life Communities	PA	22	
11	Presbyterian Senior Living	PA	30	
65	Presbyterian SeniorCare	PA	20	
12	Cornerstone Affiliates	CA	11	
28	Concordia Lutheran Ministries	PA	10	
8	The Kendal Corporation	PA	9	2
15	Pacific Retirement Services	OR	7	
25	Springpoint Senior Living, Inc.	NJ	6	1
17	Asbury Communities	MD	5	
58	Virginia United Methodist Homes, Inc.	VA	5	
40	Episcopal Senior Communities	CA	4	
63	Integrace	MD	4	4
133	The Loomis Communities	MA	4	
98	BHI Senior Living, Inc.	IN	3	
78	Northern California Presbyterian Homes and Services, Inc.	CA	3	
44	Presbyterian Homes	IL	3	
76	The Presbyterian Homes, Inc.	NC	3	
73	Blue Skies of Texas	TX	2	1
60	Friendship Senior Options	IL	2	
92	Goodwin House Incorporated	VA	2	
36	Hebrew SeniorLife	MA	2	
30	National Church Residences	OH	2	

2015 Rank	System Name	State	Accreditation	
			CARF-CCAC	JCAHO
95	Givens Estates	NC	1	
48	Greencroft Communities	IN	1	
112	Landis Communities	PA	1	
54	Masonicare, Inc.	CT	1	
14	Ohio Presbyterian Retirement Services	OH	1	
136	Porter Hills	MI	1	
138	Smith Senior Living	IL	1	
115	Wesley Willows	IL	1	
83	Westminster Ingleside Retirement Communities	DC	1	
26	Franciscan Communities, Inc.	IL		5
53	Lutheran Life Ministries	IL		5
38	Jewish Home Lifecare	NY		3
49	Bethesda Health Group, Inc.	MO		3
93	Los Angeles Jewish Home	CA		1
150	Life Care Pastoral Services	FL	1	
2	National Senior Campuses	MD		1
32	Jewish Home Lifecare	NY		3
38	Providence Life Services	IL		4
54	Lutheran Life Communities	IL		2
49	Bethesda Health Group, Inc.	MO		3
93	Los Angeles Jewish Home	CA		1
TOTAL			168	39

4-11 2015 LeadingAge Ziegler 150

Organizational Characteristics: Accreditation

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



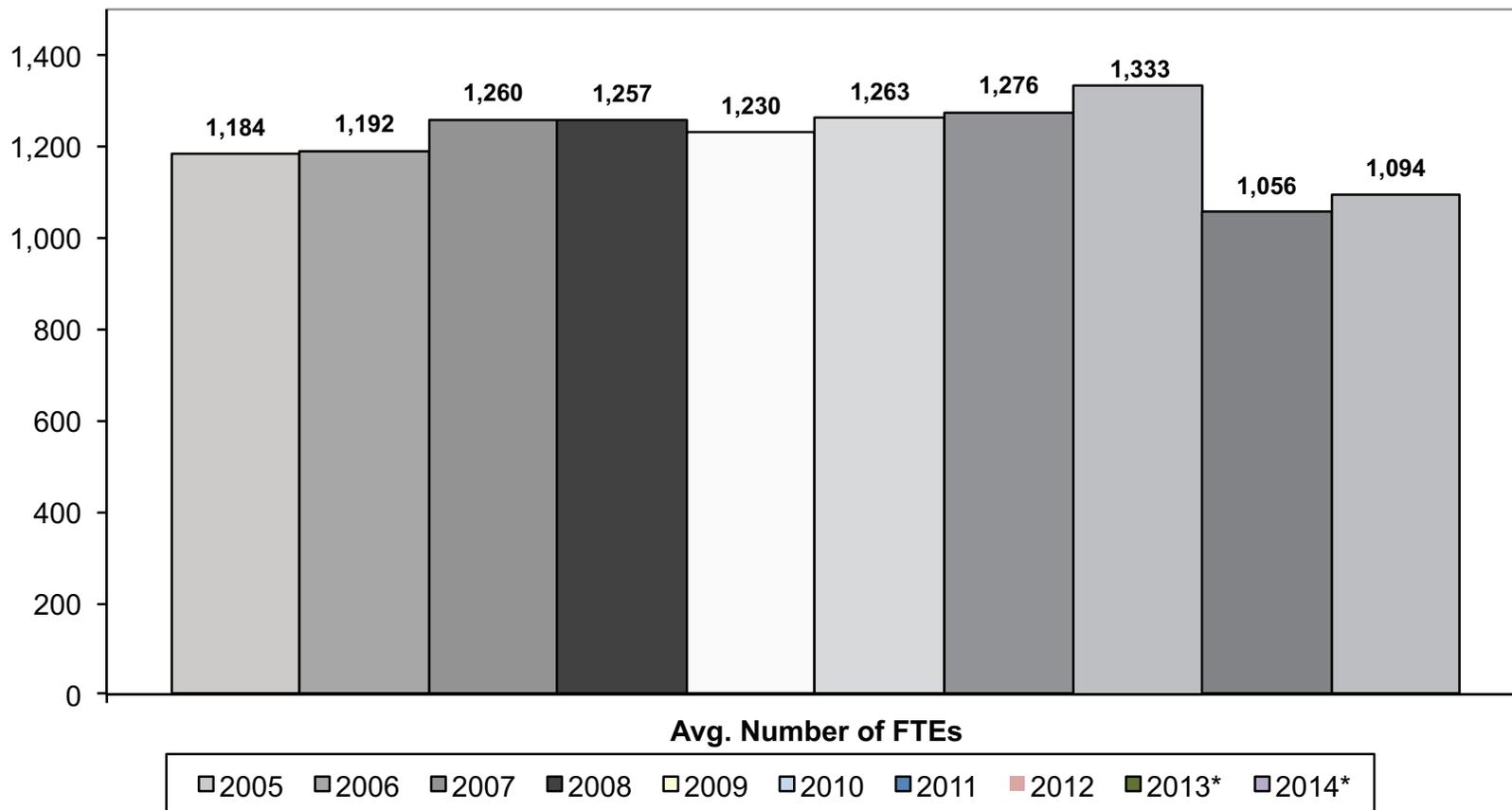
168 Accredited Communities through CARF-CCAC
39 Accreditations through JCAHO

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

4-12 2015 LeadingAge Ziegler 150

Organizational Characteristics: Staffing
4-12a AVERAGE OF EMPLOYEES, 2005-2014

2014* Average FTE/Resident: .67



*2013 and 2014 reflects change to the largest 150 organizations

4-12 2015 LeadingAge Ziegler 150

Summary of the Data: Staffing

4-12b SUMMARY OF EMPLOYEES, 2010-2014

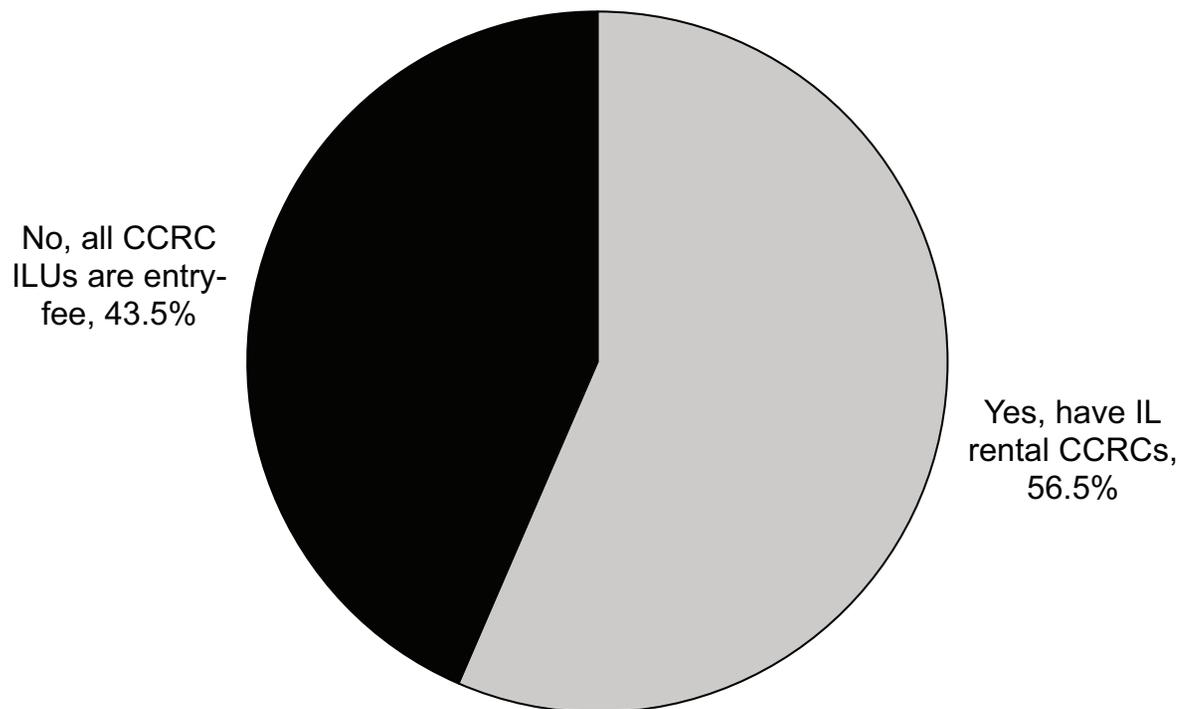
Analysis for 2015 LZ 150 by Year		
Year	Average Number of FTEs	Average FTE/Resident
2010 avg FTE/resident n=97	1,263	0.66
2011 avg FTE/resident n=96	1,276	0.64
2012 avg FTE/resident n=90	1,333	0.65
2013 avg FTE/resident n=85	1,331	0.67
2013* avg FTE/resident n=121	1,056	0.67
2014* avg FTE/resident n=123	1,093	0.67

*Note change from 100 to 150 with the 2014 publication

4-13 2015 LeadingAge Ziegler 150

Organizational Characteristics: RENTAL CCRCs

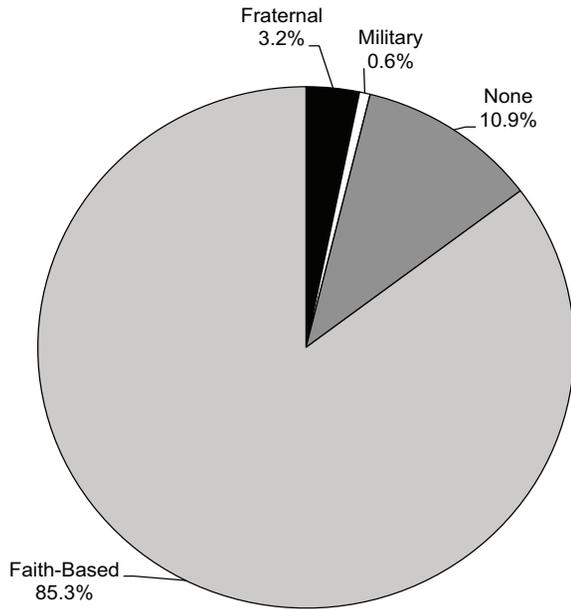
4-13a LZ 150 ORGANIZATIONS WITH CCRC RENTAL IL OPTION



4-14 2015 LeadingAge Ziegler 150

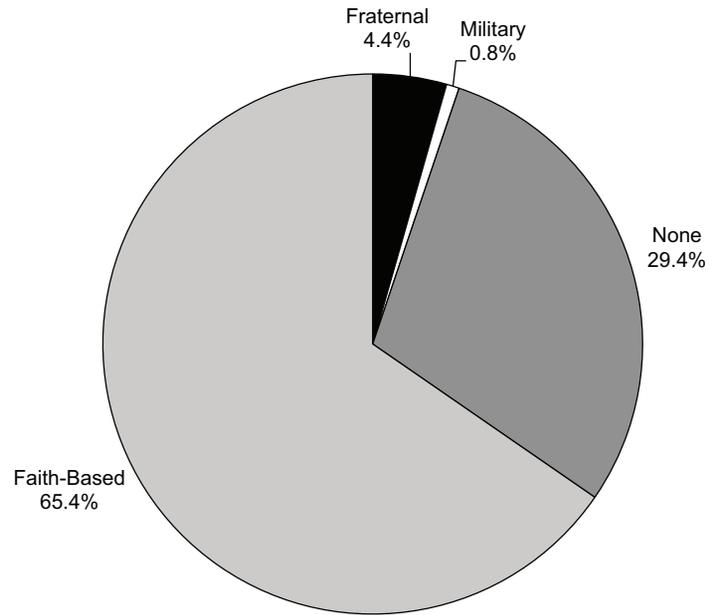
Analysis of the Data: Affiliations

4-14a AFFILIATION BY TOTAL NUMBER OF SYSTEMS



Analysis of the Data: Affiliations

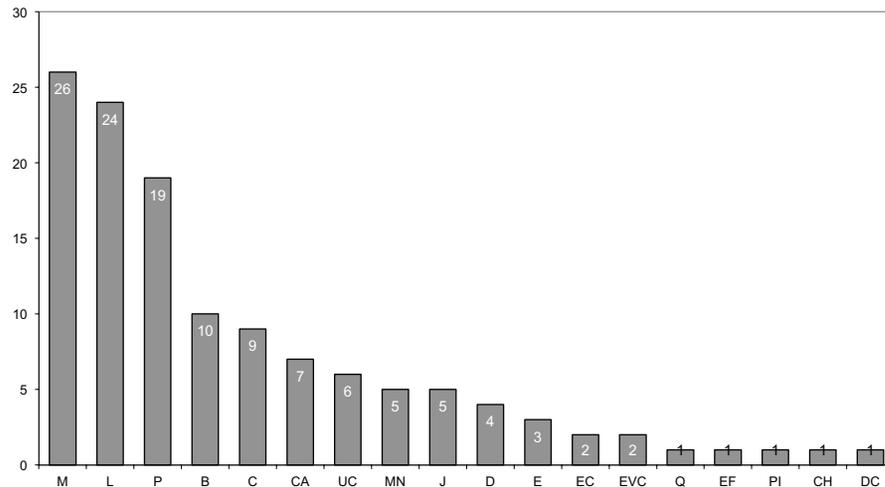
4.14b AFFILIATION BY TOTAL NUMBER OF UNITS



4-14 2015 LeadingAge Ziegler 150

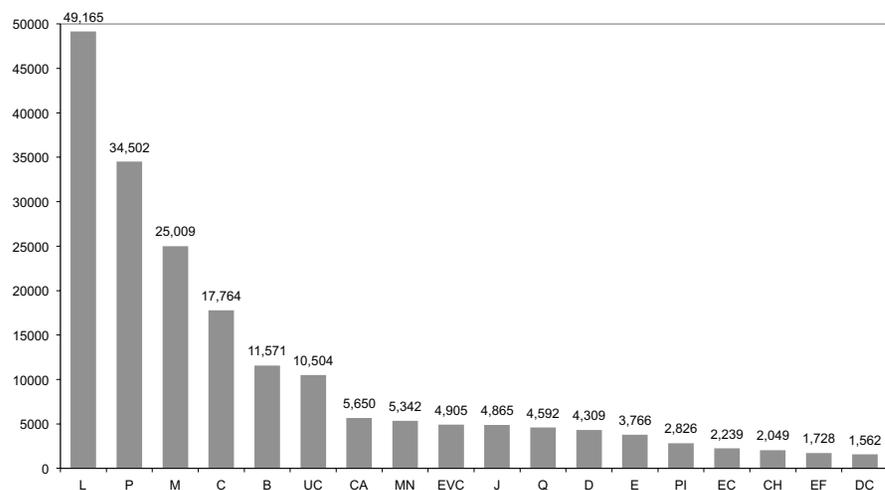
Analysis of the Data: Affiliations

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



Analysis of the Data: Affiliations

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



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

4-15 2015 LeadingAge Ziegler 150

Organizational Characteristics: Affordable Housing

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

LZ 150 AH Rank	2015 Rank	System Name	State	Units	Communities
1	30	National Church Residences	OH	21,818	323
2	6	Retirement Housing Foundation	CA	11,198	124
3	21	Volunteers of America	VA	9,939	175
4	12	Cornerstone Affiliates	CA	2,506	34
5	74	United Church Homes, Inc.	OH	2,074	49
6	10	Westminster Communities of Florida	FL	2,032	10
7	75	Presby's Inspired Life	PA	1,985	27
8	50	be.group	CA	1,844	26
9	25	Springpoint Senior Living, Inc.	NJ	1,754	18
10	56	Presbyterian Villages of Michigan	MI	1,504	23
11	2	Evangelical Lutheran Good Samaritan Society	SD	1,351	32
12	15	Pacific Retirement Services	OR	1,045	25
14	65	Presbyterian SeniorCare	PA	999	22
15	11	Presbyterian Senior Living	PA	977	10
17	90	Christian Care Communities, Inc.	KY	805	12
18	36	Hebrew SeniorLife	MA	765	3
19	116	Lutheran Homes Society	OH	651	11
20	40	Episcopal Senior Communities	CA	626	6
21	120	St. Andrew's Resources for Seniors System	MO	604	13
22	78	Northern California Presbyterian Homes and Services, Inc.	CA	599	3
23	38	Jewish Home Lifecare	NY	554	5
25	13	Ecumen	MN	507	10
26	9	Lutheran Senior Services	MO	459	6
29	124	Lutheran Social Ministries of New Jersey	NJ	430	6
30	59	Phoebe Ministries	PA	356	8
31	48	Greencroft Communities	IN	352	2
32	103	Lutheran Social Services of Michigan	MI	340	5
33	19	Diakon Lutheran Social Ministries	PA	335	4
34	106	Methodist Retirement Communities	TX	318	5
35	45	Mississippi Methodist Senior Services, Inc.	MS	313	0
36	71	United Methodist Homes of New Jersey	NJ	300	5

Note: Additional Affordable Housing listings in Chapter 6

4-15 2015 LeadingAge Ziegler 150

Organizational Characteristics: Affordable Housing

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

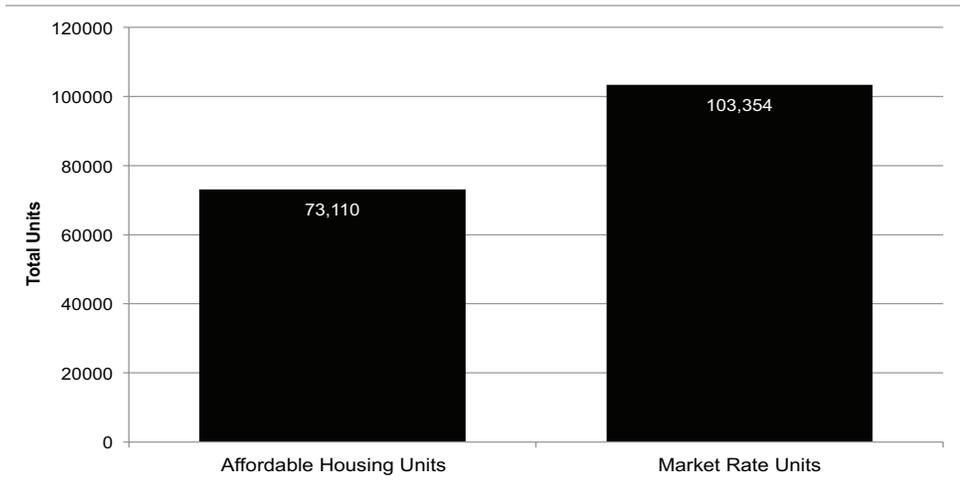
LZ 150 AH Rank	2015 Rank	System Name	State	Units	Communities
38	136	Porter Hills	MI	270	6
39	67	Lutheran SeniorLife	PA	269	7
40	77	United Church Homes and Services	NC	252	7
41	32	Christian Care Companies	AZ	247	3
42	129	Maple Knoll Communities, Inc.	OH	243	3
43	142	Sholom Community Alliance	MN	233	3
44	113	Wellspring Lutheran Services	MI	231	5
45	145	United Methodist Retirement Communities, Inc.	MI	228	3
47	95	Givens Estates	NC	178	2
48	35	Providence Life Services	IL	161	2
49	14	Ohio Presbyterian Retirement Services	OH	150	1
51	26	Franciscan Communities, Inc.	IL	139	3
52	22	Christian Homes, Inc.	IL	130	2
53	44	Presbyterian Homes	IL	108	3
54	16	Front Porch Communities and Services	CA	100	1
55	87	Living Branches	PA	100	1
56	51	Wesley Enhanced Living	PA	100	2
57	64	Lutheran Social Services of South Central Pennsylvania	PA	99	3
58	91	Simpson Senior Services	PA	81	2
59	122	Masonic Homes of Kentucky	KY	80	1
60	146	Albright Care Services	PA	74	1
61	140	Lutheran Social Services of the South, Inc.	TX	68	1
64	33	Elim Care, Inc.	MN	48	1
66	85	Eventide	MN	46	1
67	110	Christian Living Ventures (formerly Christian Living Communities)	CO	40	1
68	118	Episcopal SeniorLife Communities	NY	40	1
70	135	Deaconess Abundant Life Communities	MA	34	1
71	39	Eskaton	CA	21	1
60	87	Oakwood Lutheran Senior Ministries	WI	30	1
61	81	The United Methodist Retirement Homes, Inc.	NC	24	1
62	37	Eskaton	CA	21	1

Note: Additional Affordable Housing listings in Chapter 6

4-15 2015 LeadingAge Ziegler 150

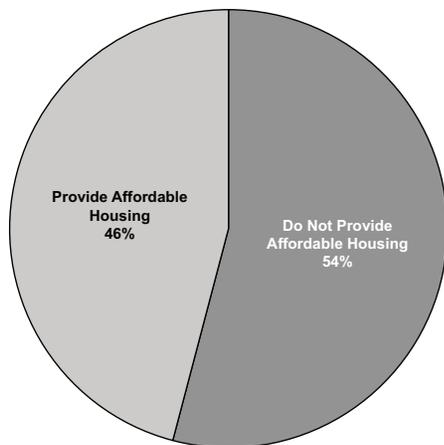
Organizational Characteristics: Affordable Housing

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



Organizational Characteristics: Affordable Housing

4-15c PERCENTAGE OF LZ 150 PROVIDING HOUSING



4-16 2015 LeadingAge Ziegler 150

Organizational Characteristics: Managed Units & Communities

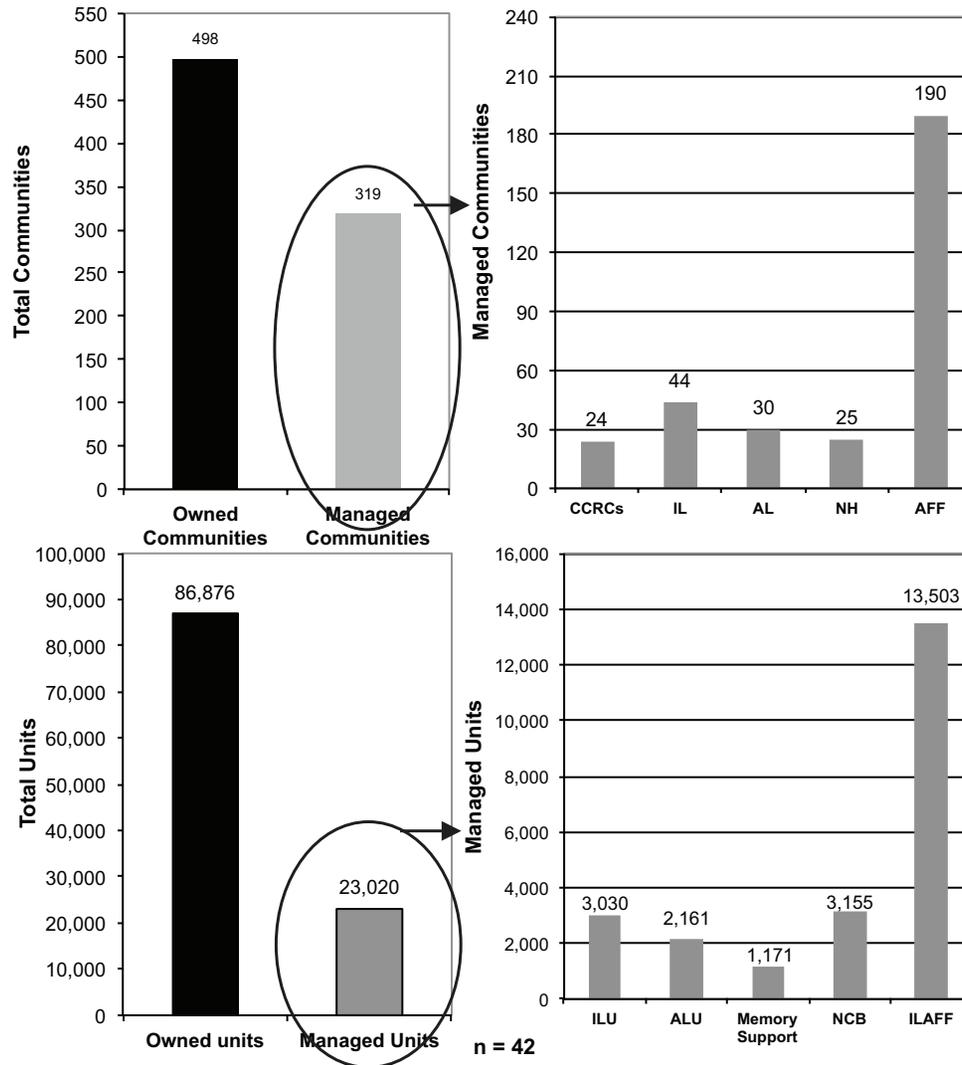
4-16a LZ 150 PROVIDERS THAT MANAGE, RANKED BY MANAGED-ONLY UNITS

LZ 150 Managed Rank	2015 LZ 150 Rank	System Name	State	Managed-only		LZ 150 Managed Rank	2015 LZ 150 Rank	System Name	State	Managed-only	
				Units	Communities					Units	Communities
1	30	National Church Residences	OH	4,402	67	23	71	United Methodist Homes of New Jersey	NJ	240	4
2	12	Cornerstone Affiliates	CA	1,773	26	24	54	Masonicare, Inc.	CT	215	3
3	16	Front Porch Communities and Services	CA	1,547	22	25	98	BHI Senior Living, Inc.	IN	199	2
4	39	Eskaton	CA	1,304	27	26	10	Westminster Communities of Florida	FL	196	1
5	65	Presbyterian SeniorCare	PA	1,262	25	27	92	Goodwin House Incorporated	VA	161	1
6	13	Ecumen	MN	1,204	20	28	141	St. John's Lutheran Ministries	MT	160	1
7	15	Pacific Retirement Services	OR	936	4	29	48	Greencroft Communities	IN	154	3
8	74	United Church Homes, Inc.	OH	917	11	30	53	Lutheran Life Ministries (fka Lutheran Life Communities)	IL	105	1
9	17	Asbury Communities	MD	828	3	31	99	Western Home Communities	IA	96	3
10	75	Presby's Inspired Life	PA	802	13	32	14	Ohio Presbyterian Retirement Services	OH	90	1
11	2	Evangelical Lutheran Good Samaritan Society	SD	758	14	33	5	Covenant Retirement Communities, Inc.	IL	86	1
12	120	St. Andrew's Resources for Seniors System	MO	721	4	34	26	Franciscan Communities, Inc.	IL	85	1
13	6	Retirement Housing Foundation	CA	695	4	35	90	Christian Care Communities, Inc.	KY	72	1
14	128	National Lutheran Communities & Services	MD	670	5	36	77	United Church Homes and Services	NC	72	2
15	148	Life Care Pastoral Services	FL	550	2	37	140	Lutheran Social Services of the South, Inc.	TX	68	1
16	27	Augustana Care	MN	476	11	38	78	Northern California Presbyterian Homes and Services, Inc.	CA	67	1
17	113	Wellspring Lutheran Services	MI	427	13	39	22	Christian Homes, Inc.	IL	60	1
18	20	Masonic Villages of the Grand Lodge of Pennsylvania	PA	385	1	40	67	Lutheran SeniorLife	PA	45	1
19	35	Providence Life Services	IL	347	1	41	56	Presbyterian Villages of Michigan	MI	22	1
20	103	Lutheran Social Services of Michigan	MI	278	8	42	124	Lutheran Social Ministries of New Jersey	NJ	20	1
21	9	Lutheran Senior Services	MO	274	5						
22	42	Loretto	NY	251	2						

4-16 2015 LeadingAge Ziegler 150

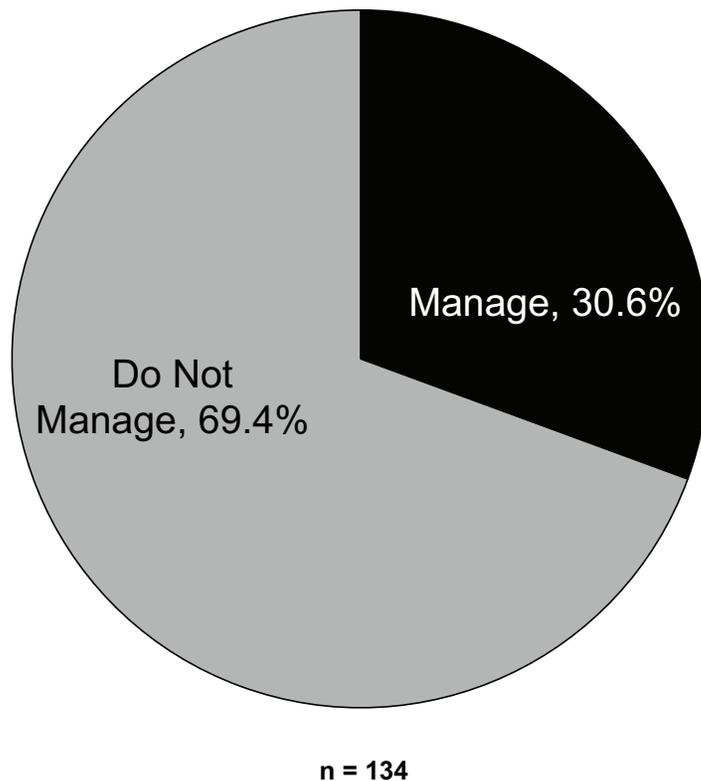
Organizational Characteristics: Managed Units & Communities

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



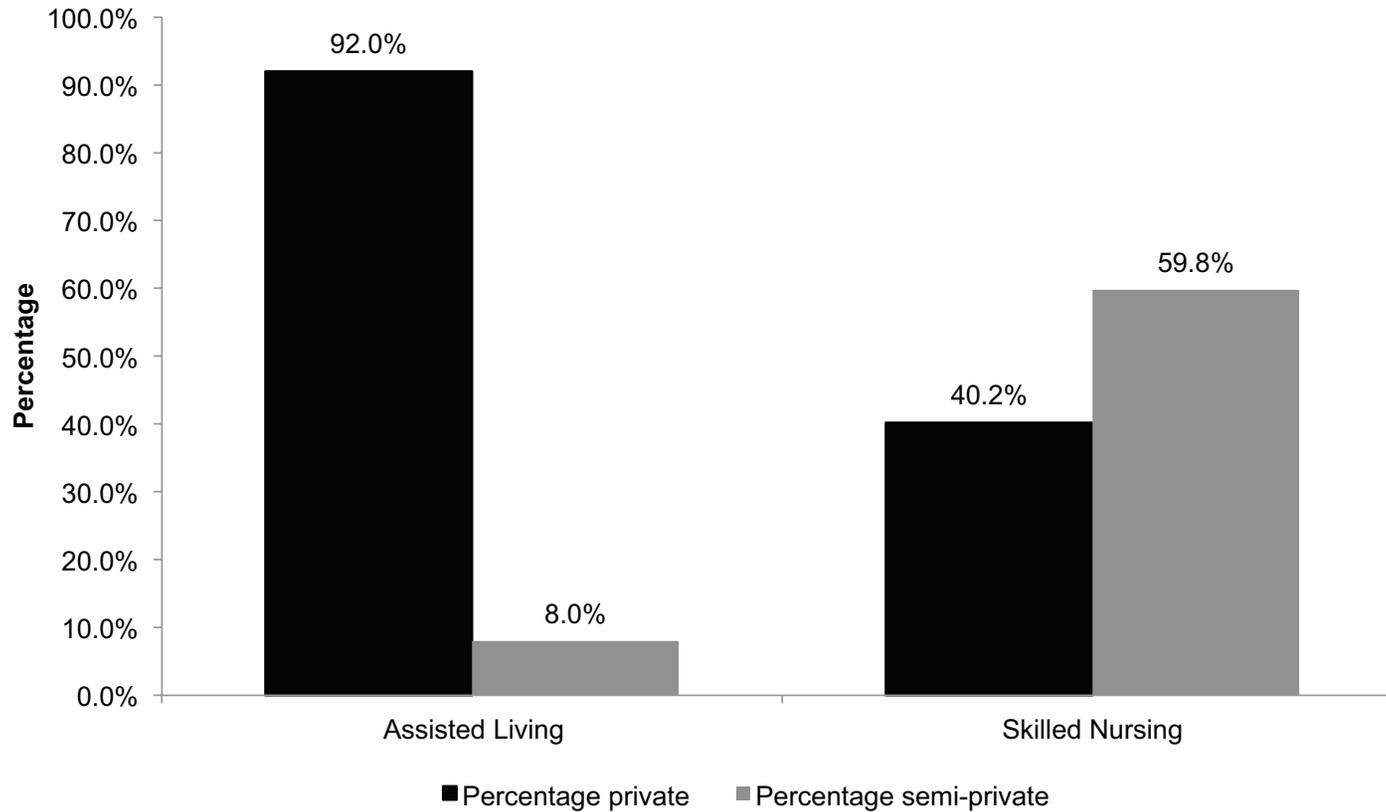
4-16 2015 LeadingAge Ziegler 150

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



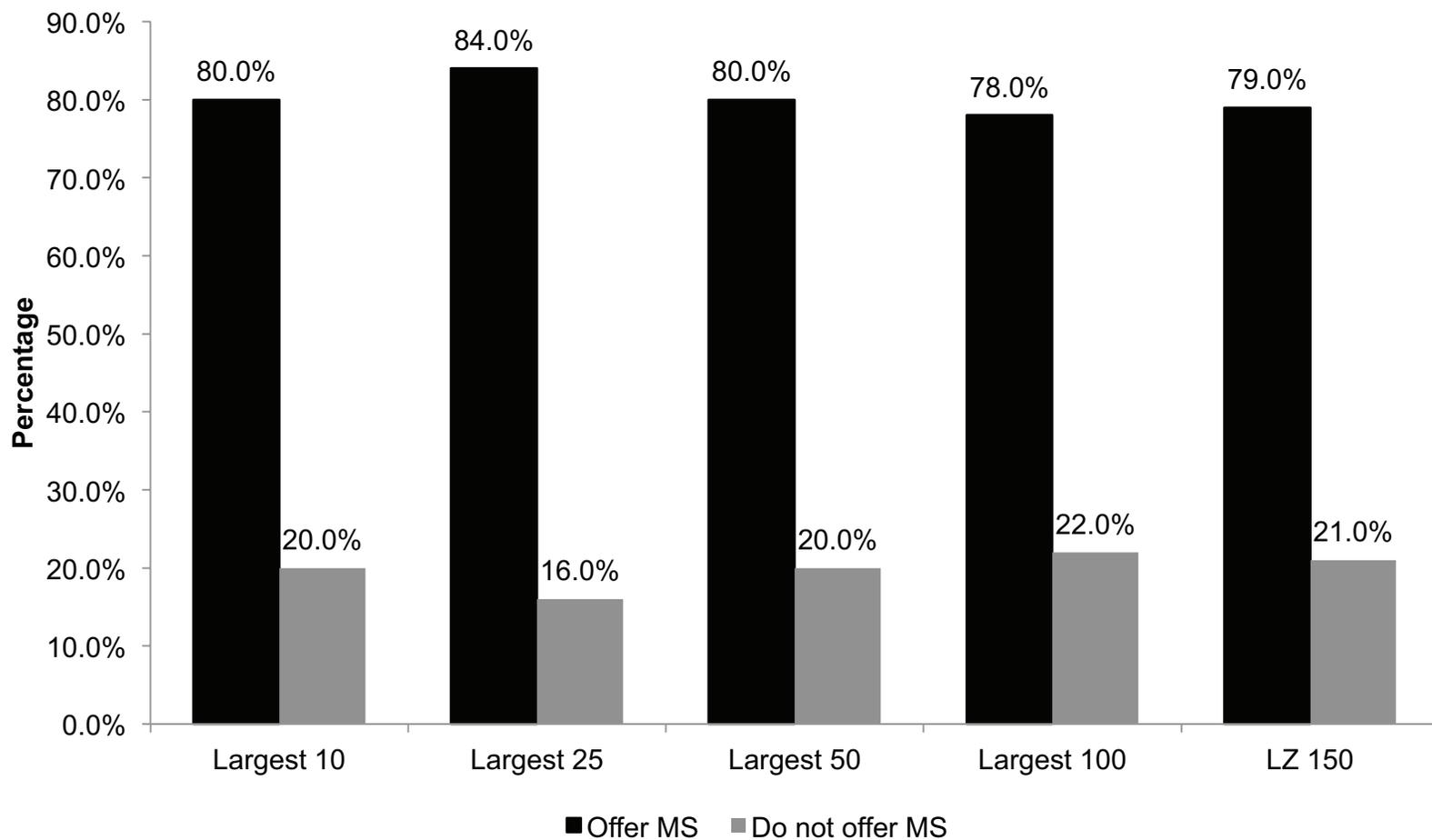
4-17 2015 LeadingAge Ziegler 150

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



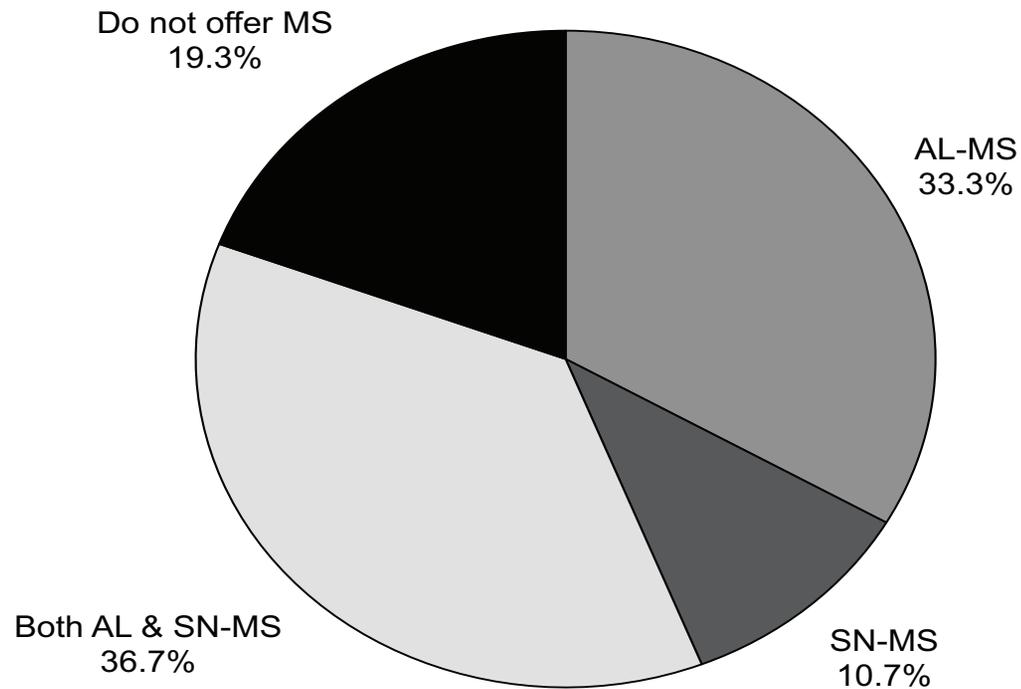
4-17 2015 LeadingAge Ziegler 150

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



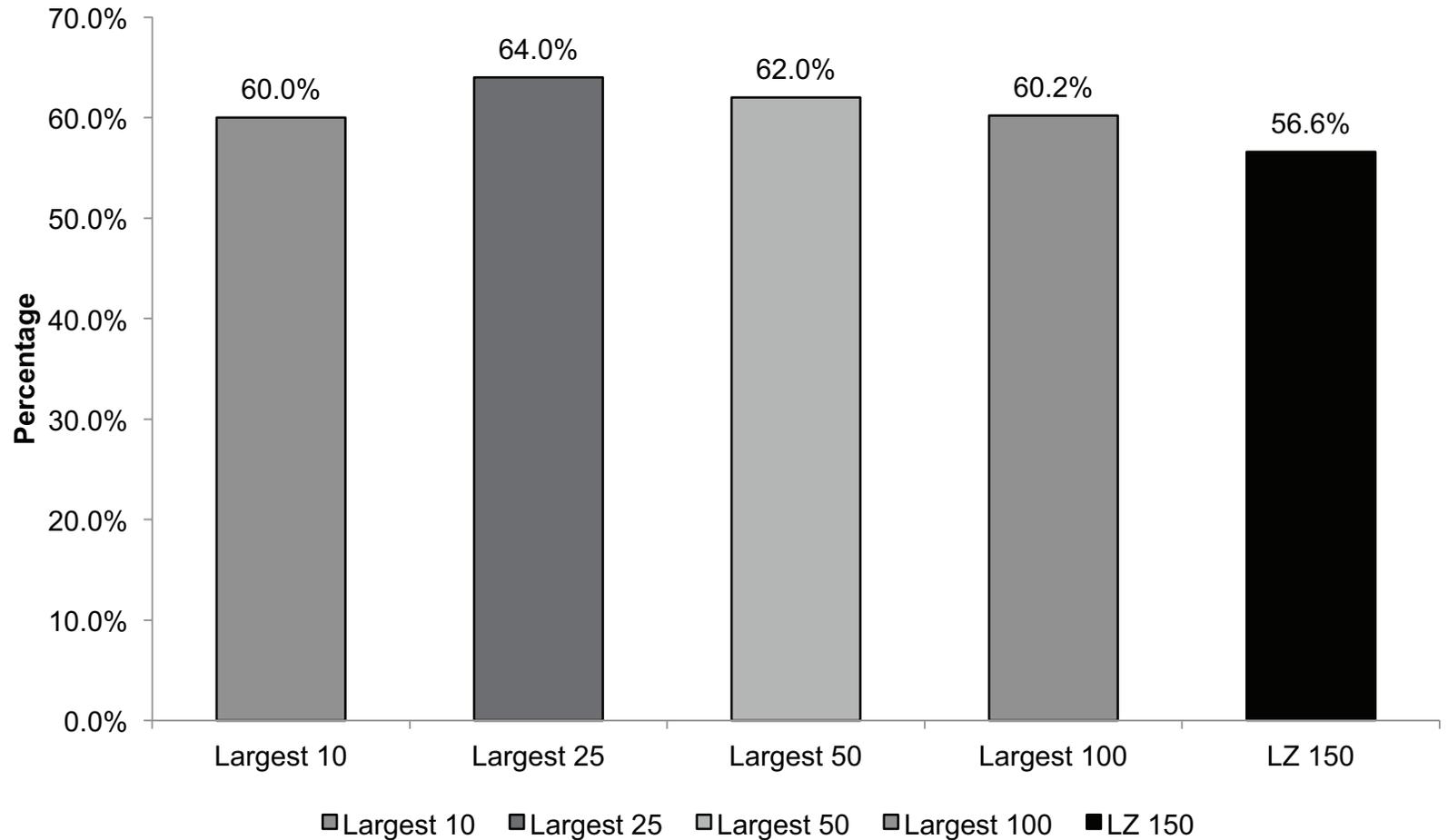
4-17 2015 LeadingAge Ziegler 150

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



4-18 2015 LeadingAge Ziegler 150

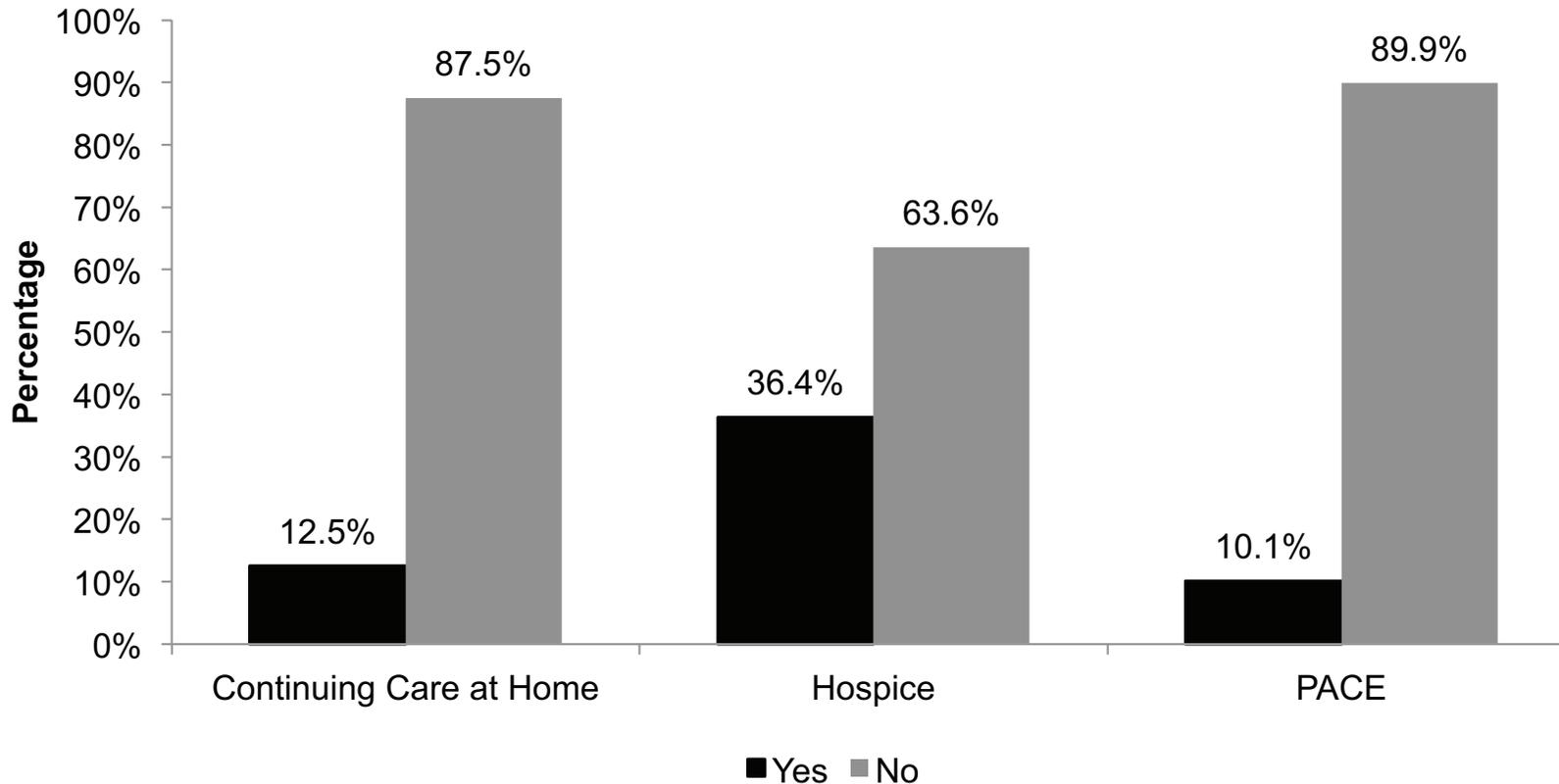
Organizational Characteristics: Home & Community-Based Services
4-18a PERCENTAGE OF LZ 150 THAT OFFER HCBS TO NON-RESIDENTS



4-18 2015 LeadingAge Ziegler 150

Organizational Characteristics: Home & Community-Based Services

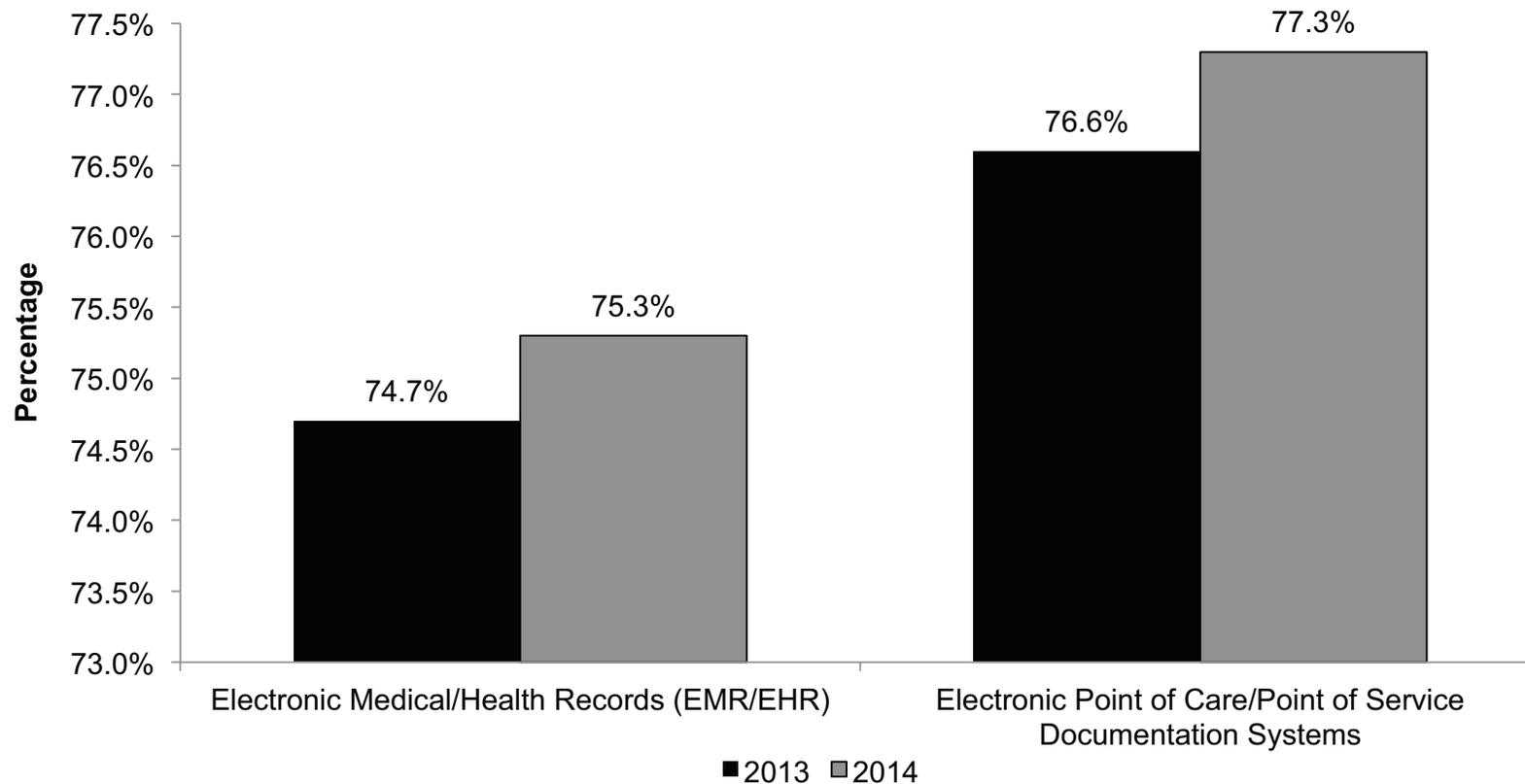
4-18b LZ 150 OFFERING: PACE, CCaH, EXTERNAL HOSPICE



4-19 2015 LeadingAge Ziegler 150

Organizational Characteristics: Technology

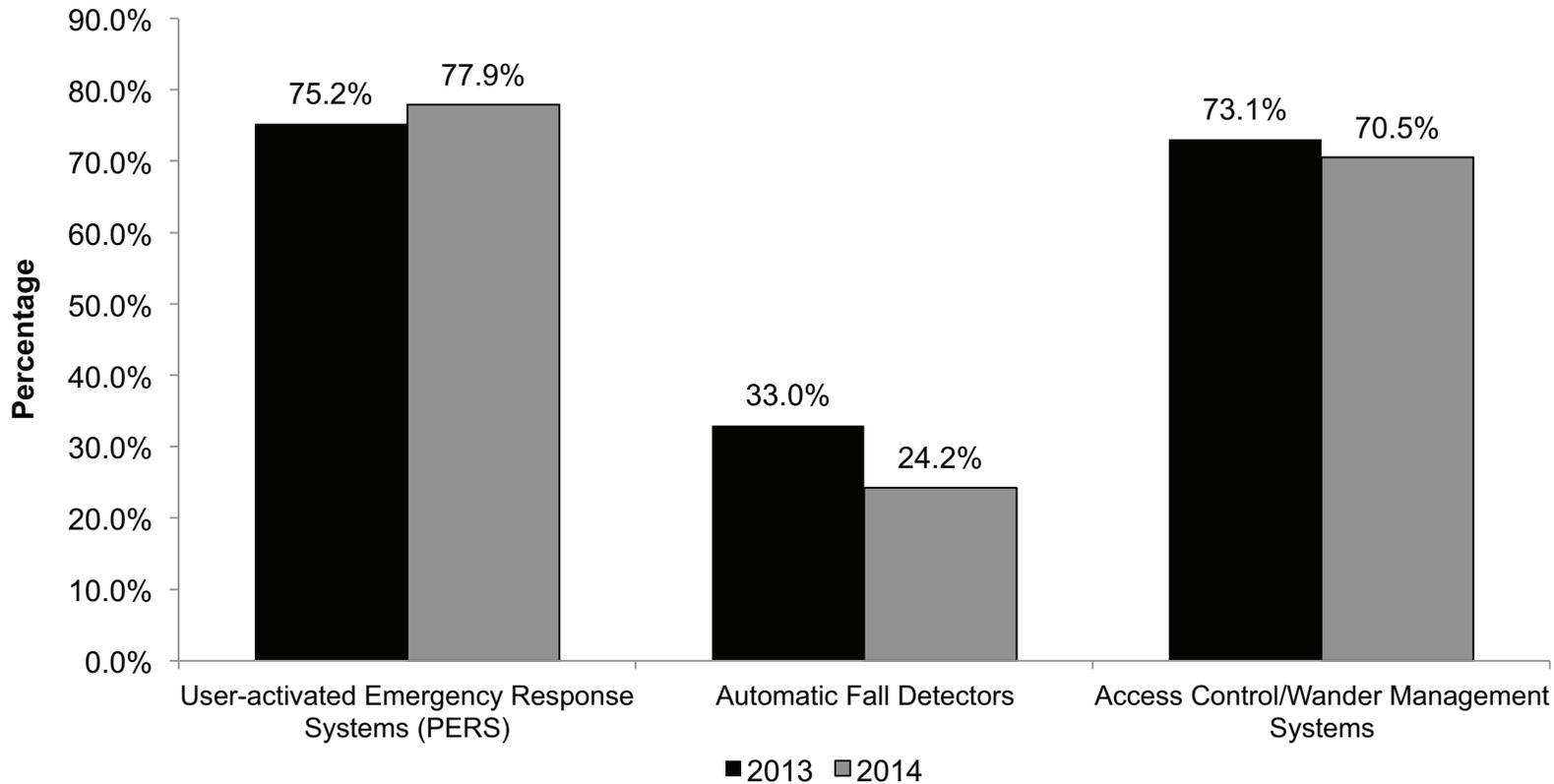
4-19a PERCENTAGE OF LZ150 COMMUNITIES/OPERATIONS USING ELECTRONIC DOCUMENTATION TECHNOLOGIES



4-19 2015 LeadingAge Ziegler 150

Organizational Characteristics: Technology

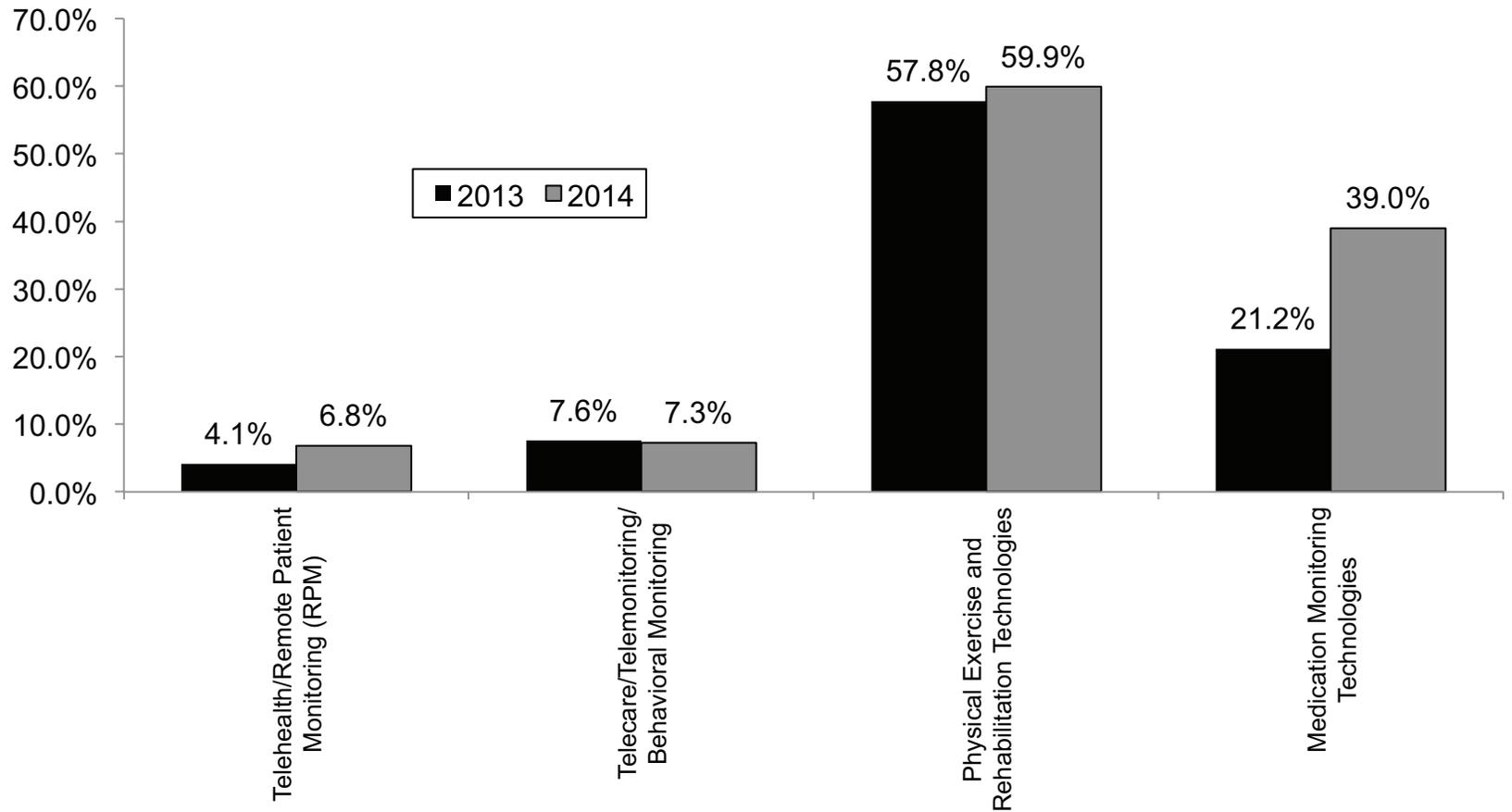
4-19b PERCENTAGE OF LZ150 COMMUNITIES/OPERATIONS USING SAFETY MONITORING TECHNOLOGIES



4-19 2015 LeadingAge Ziegler 150

Organizational Characteristics: Technology

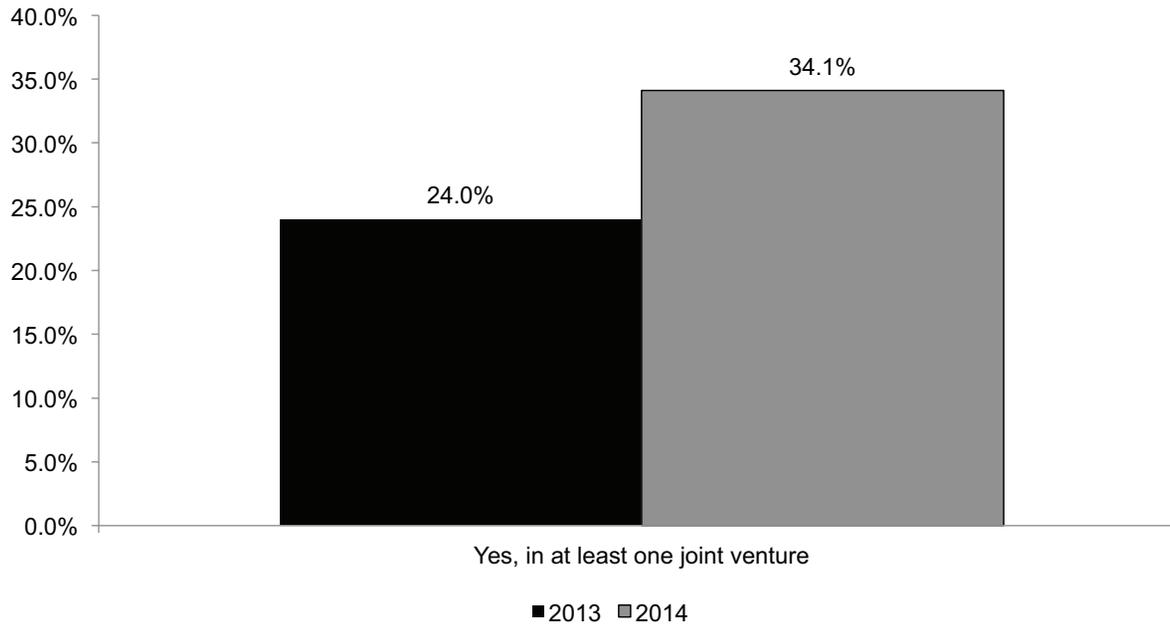
4-19c PERCENTAGE OF LZ150 COMMUNITIES/OPERATIONS USING HEALTH & WELLNESS MONITORING TECHNOLOGIES



4-20 2015 LeadingAge Ziegler 150

Organizational Characteristics: Joint Ventures

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



Organizational Characteristics: Joint Ventures

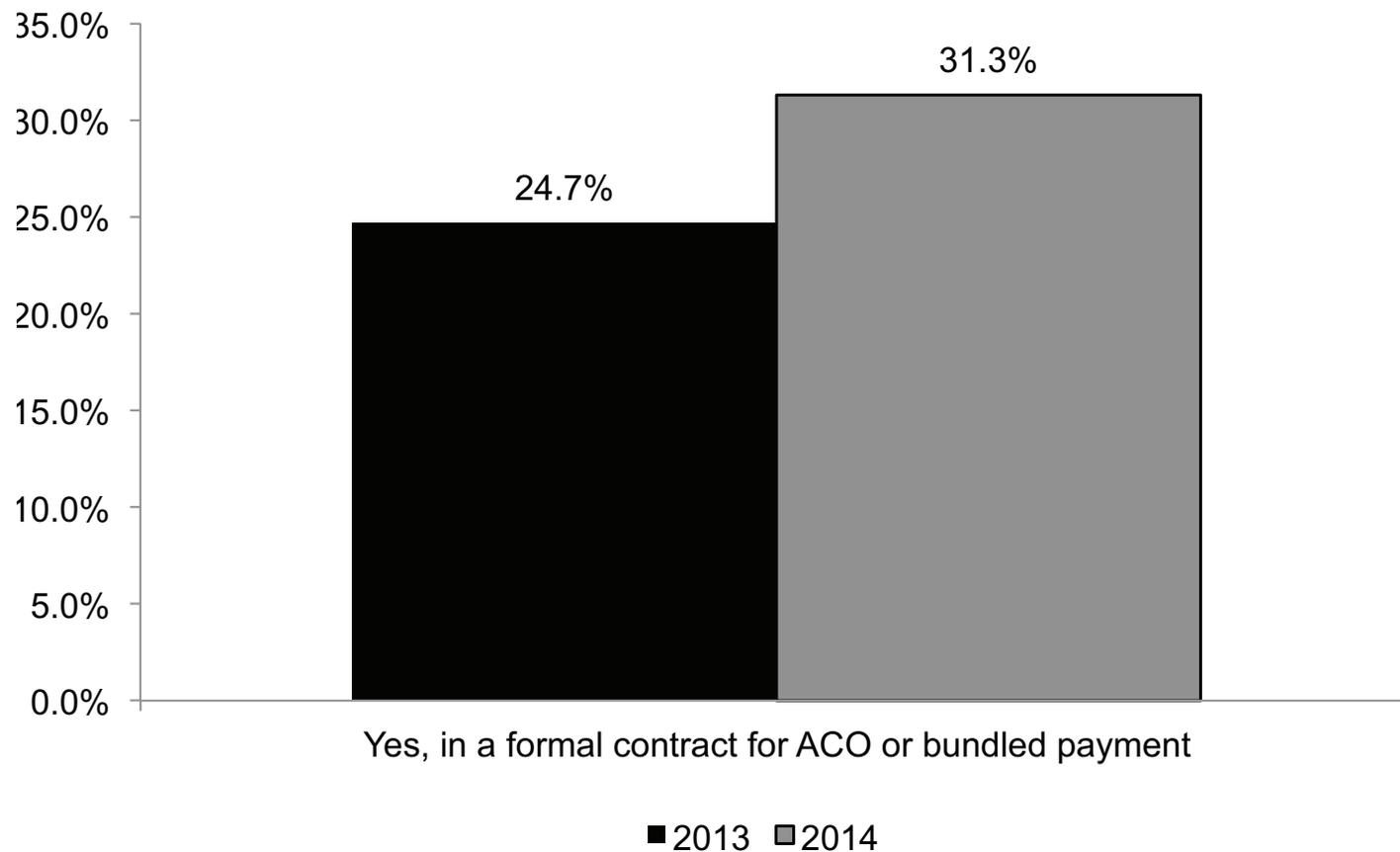
4-20b TYPE OF JOINT VENTURE

Type of JV/With Whom	
Most Mentions	# of Mentions
Another NFP Senior Living Provider	17
Home Health/Home Care	15
Hospital/Health System	13
Rehabilitation/Therapy	7
Hospice	6
PACE	4
Pharmacy	3
Physican's Group	3
Purchasing	3

4-20 2015 LeadingAge Ziegler 150

Organizational Characteristics: Joint Ventures

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



Chapter 5

Growth and Change

This section of the LZ 150 publication is focused on the ways in which the LZ 150 have grown and changed over their histories. The analysis includes the largest 10 organizations and how they have changed since inception. History is divided into multiple segments, first from 1900, then from 1950, 1980, 1990 and 2000. The bird's eye view of the growth of these organizations illustrates the pace of growth by type of unit. Their combined growth in numbers of ILUs, ALUs, NCBs and total units is traced. Note: Due to the number of communities owned by ELGSS, capturing the details of the organization's change over the years has proven to be more difficult than anticipated. This organization's history continues to be excluded from the Pace of Growth charts.

The charts provide a dramatic picture of the pace of growth over the last century, particularly since 1950. The most rapid growth has occurred since 1990, with independent living leading this growth. The growth in number of assisted living and nursing care beds shown on each of the charts (relatively flat) has been achieved primarily through CCRC construction as opposed to the addition of free-standing communities. The cross-over in growth rates, i.e. when the growth in NCBs and ALUs was eclipsed by the growth in ILUs, occurred in the early 1960s. Chart 5-1b shows that ILU growth for the LZ 150 (Largest 10 Systems, excluding ELGSS) began its current trend of more rapid ascent in the mid-1970s.

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

Pace of Growth: The Largest 25

Pace of Growth charts (Charts 5-4a-w) trace the growth patterns of 23 of the 25 largest multi-sites in the LZ 150. Each significant point of growth in a multi-site's history is marked and explained on the chart. We continue to exclude two of the largest 25 organizations of the LZ 150 where we have insufficient detail to track historical growth for Pace of Growth charts: ELGSS (LZ 150 #2) and Ecumen (LZ 150 #13). The Pace of Growth charts show, at a glance, the different methods of change the systems are employing. As before, significant new community construction and expansions are noted, with the emergence of the system (that is, the addition of the second community) highlighted in a dashed box. Mergers and acquisitions (gray-framed box) and dispositions (bold black box) are also highlighted.

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

Aggregate Growth

Section 5-5 of the report details the pace of growth among the LZ 150 organizations in terms of average annual growth and aggregate growth. These tables list the organizations within the LZ 150 that have increased in size the fastest between 2013 and 2014, between 2000 and 2014 and between 1990 and 2014 (Charts 5-5a-b). They are the leading multi-site organizations in the LZ 150 in terms of aggregate growth rates and total units added in each period.

Average annual growth is calculated through a geometric mean calculation that captures the time factor in growth. For example, it may have taken an organization 50 years to double from the size of its original single-site campus; it may have then doubled again in a five-year period. These changes in growth rates are not uncommon and may be the result of a combination of a new 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 be in the form of bricks-and-mortar growth or expanding home and community-based services. For purposes of the LZ 150, feedback is gathered on the intent to grow through affiliation, new campus development or expansion in the next two years. Seventy-two percent (72%) of the LZ 150 reported intentions to expand or reposition an existing campus in 2015 or 2016. With regard to growth via the construction of new communities or growth from affiliation, 38% reported that they intend to grow in this fashion. Another 25% responded "maybe" to this growth in 2015 or 2016.

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

Charts 5-8a-c and 5-9a-h describe how the largest 10, the largest 25, the largest 50 multi-sites and all 150 multi-site organizations have grown through expanding existing campuses, through construction of new communities or through merger/acquisition/affiliation and/or disposition. Properties have been classified according to the following definitions:

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

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

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

Disposition: The sale or closure of a community.

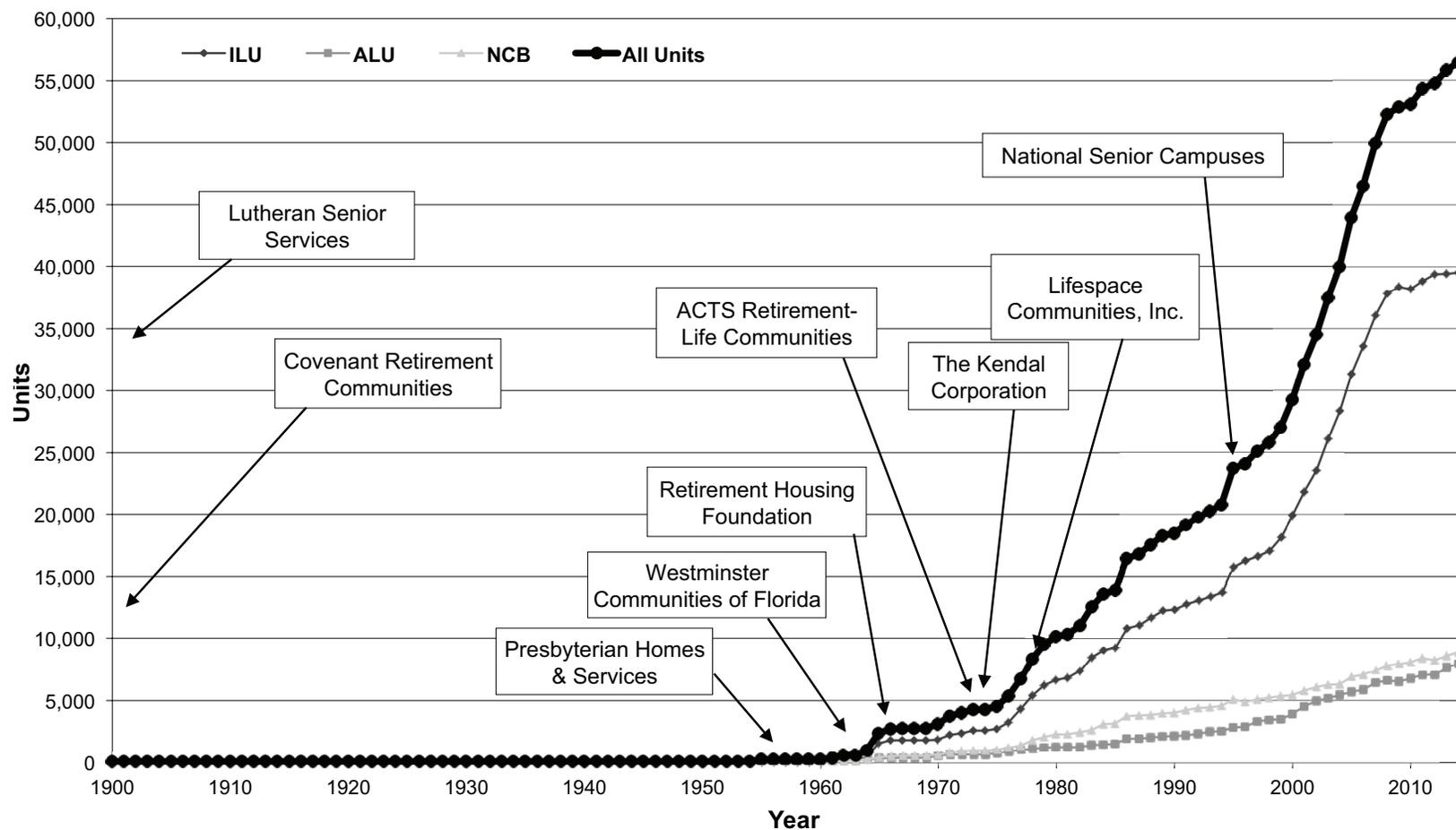
The charts at 5-8a-c analyze how communities have changed through the above-described venues over a 10-, 20- and greater than 30-year time period (1980-2014). More than 1,100 communities have been added as a result of campus expansion since 1980 (Chart 5-8a). Dispositions have also increased dramatically. What appears interesting is that of the 195 community dispositions that occurred from 1980-2014 among the LZ 150 (Chart 5-8a), more than 160 of these dispositions occurred in the last decade or so (Chart 5-8c). The most common dispositions in recent years have been free-standing nursing homes or assisted living and financially distressed CCRCs.

Charts 5-9a-h are used to present incremental growth by five-year period and cumulative growth by five-year period for each of the LZ 150 groupings (the largest 10, the largest 25, the largest 50, the largest 100, the largest 150). The second of each pair of charts shows the incremental change of the multi-sites, that is, on an annual basis how many existing properties have experienced expansion; how many properties have been added through new community construction or through merger, acquisition and/or affiliation; and how many properties have been lost through disposition. For the incremental growth charts, the final five-year period is provided with the current year shown alone. The cumulative growth charts provide the number of properties added or lost through each of these methods through the time period shown.

5-1 2015 LeadingAge Ziegler 150

Growth: Growth of Largest 10 Systems, Combined Unit Mix

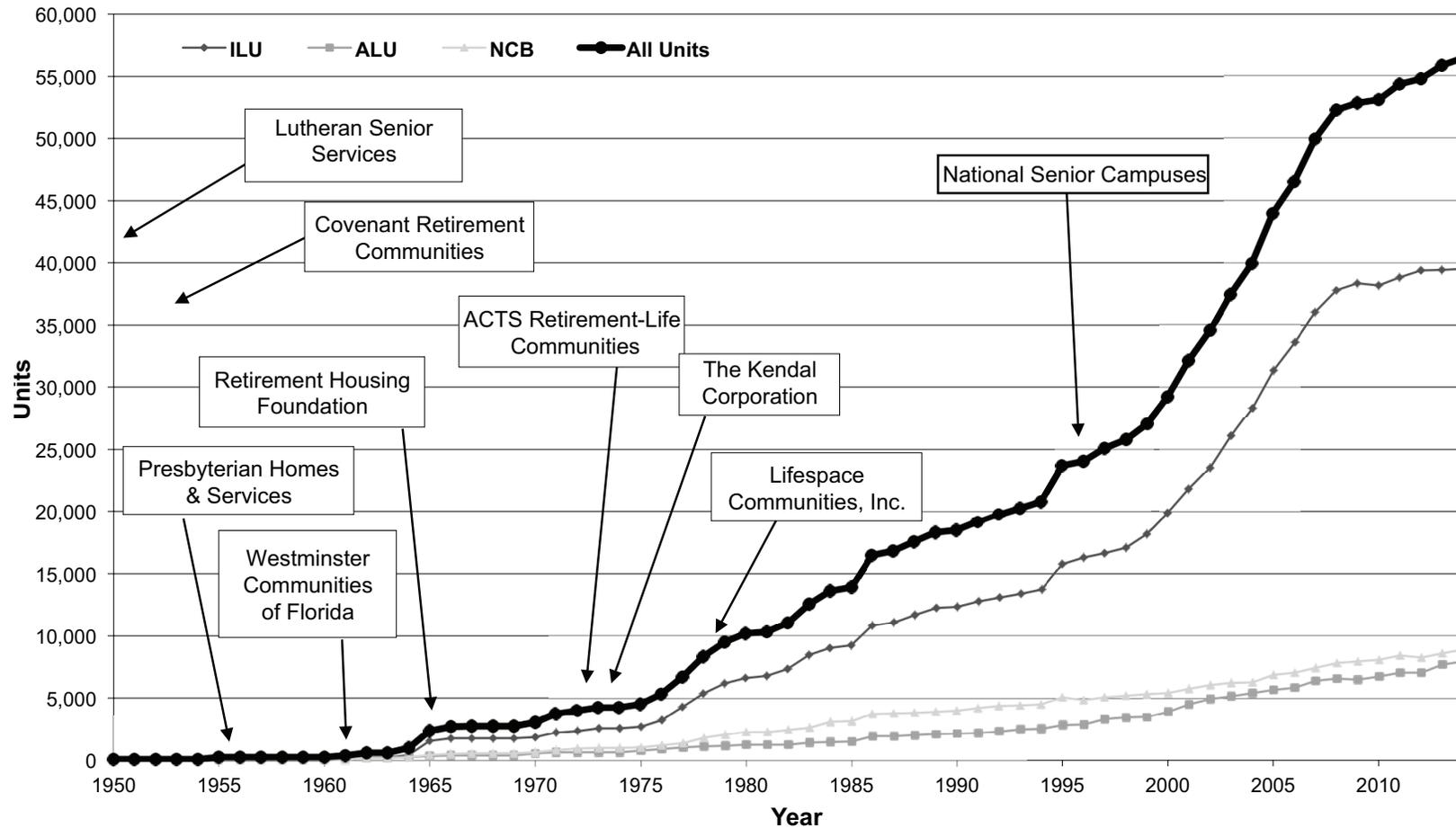
5-1a FROM 1900 (Excludes Evangelical Lutheran Good Samaritan Society)



5-1 2015 LeadingAge Ziegler 150

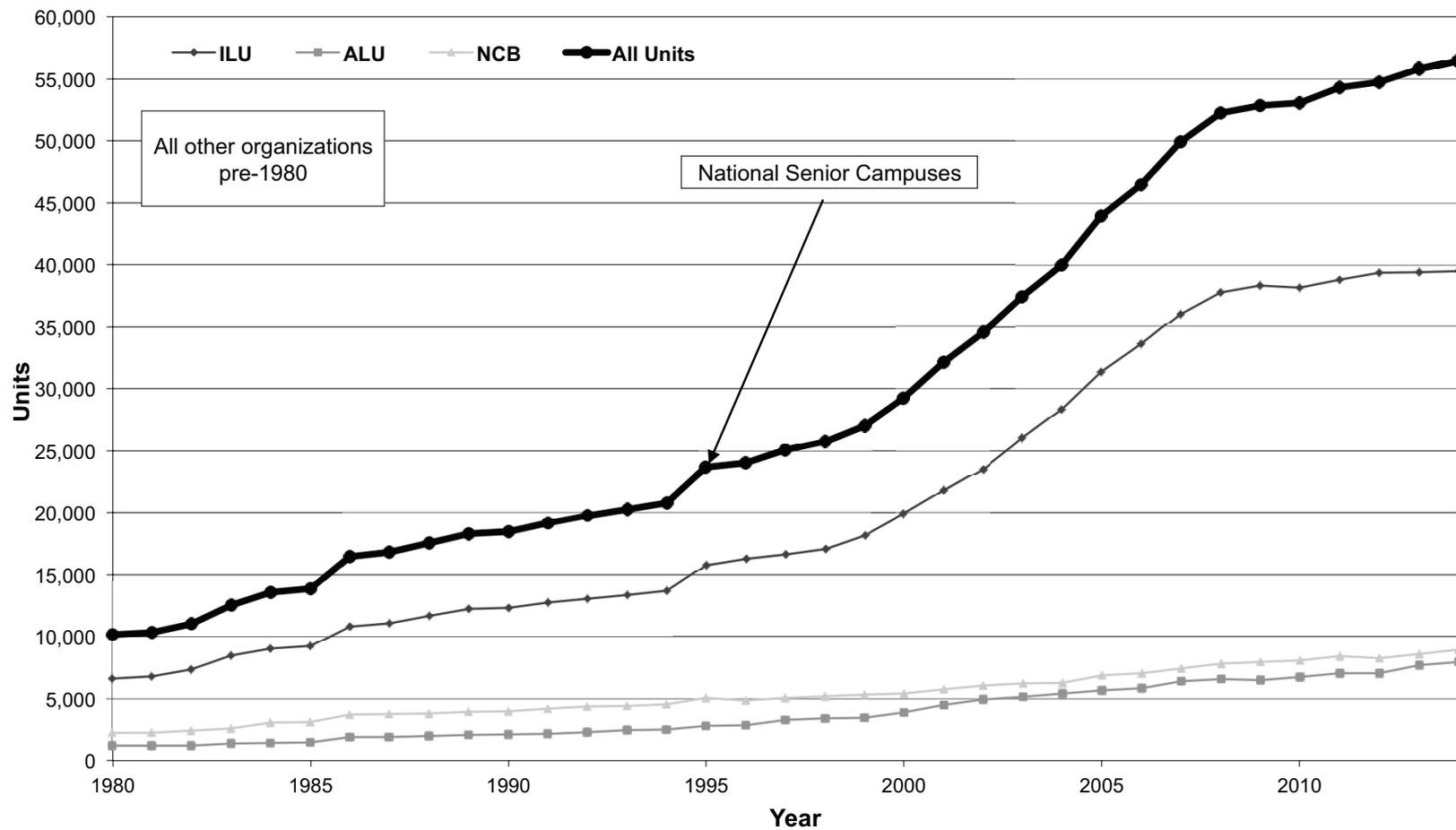
Growth: Growth of Largest 10 Systems, Combined Unit Mix

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



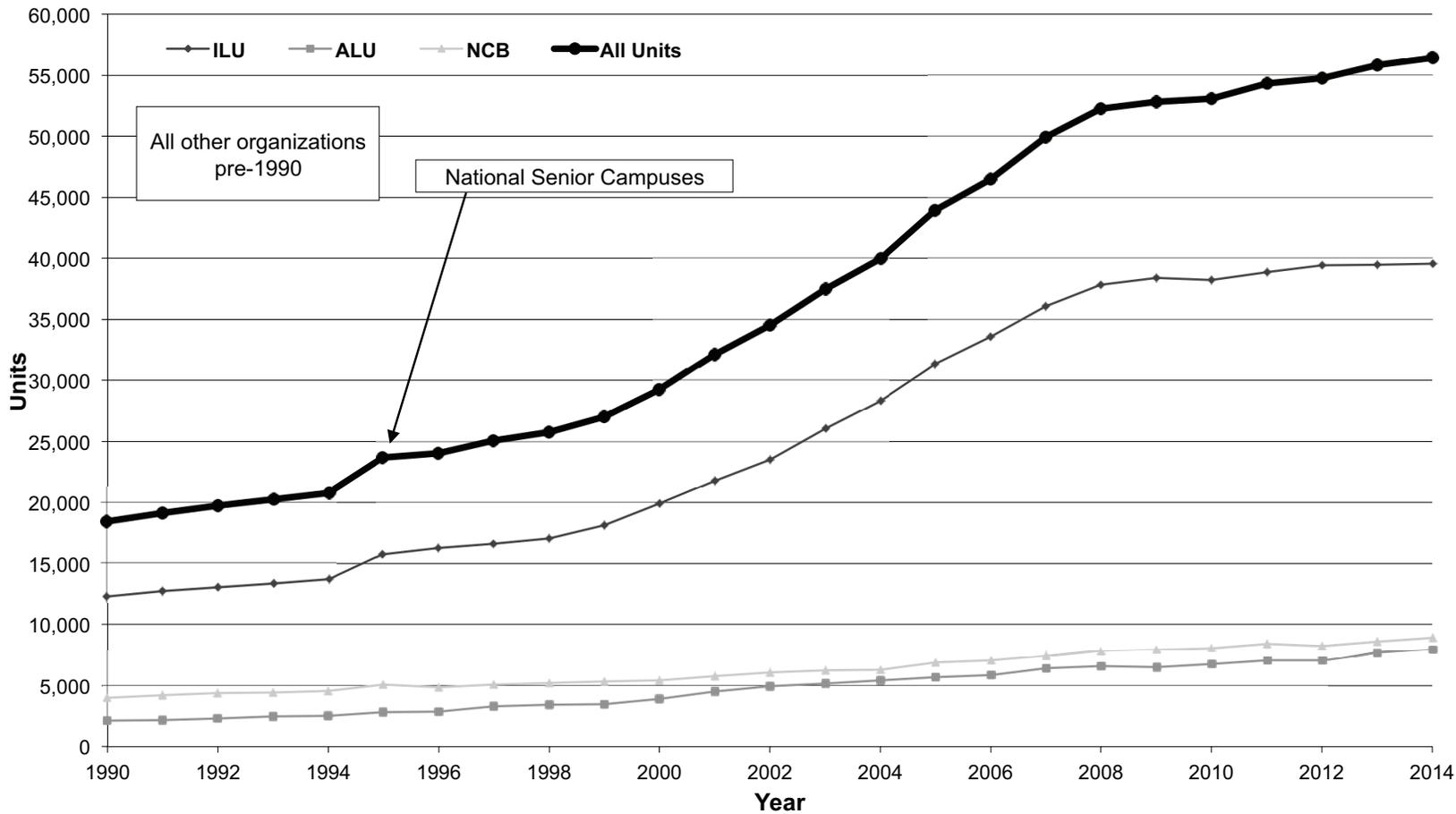
5-1 2015 LeadingAge Ziegler 150

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



5-1 2015 LeadingAge Ziegler 150

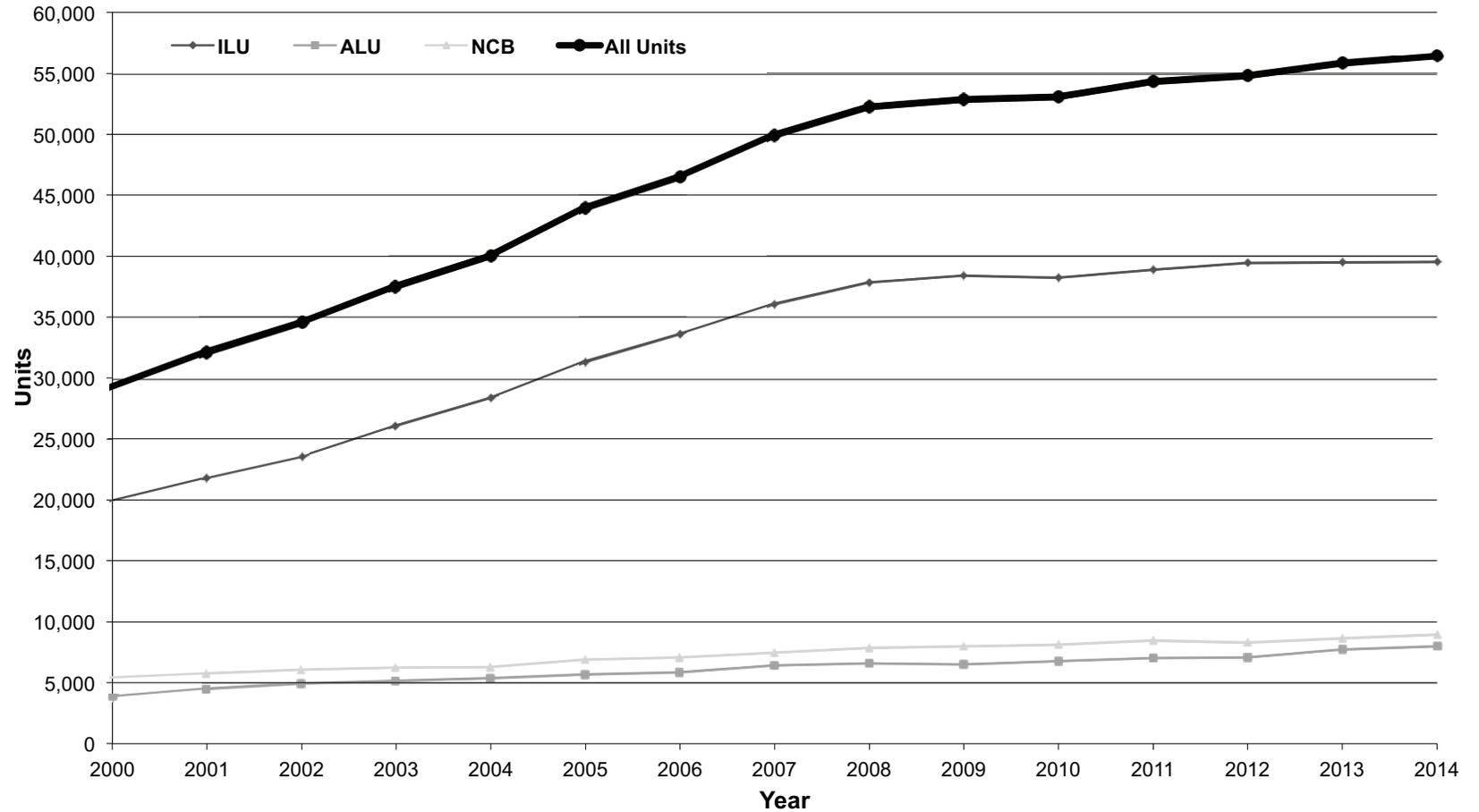
Growth: Growth of Largest 10 Systems, Combined Unit Mix
 5-1d FROM 1990 (Excludes Evangelical Lutheran Good Samaritan Society)



LeadingAge 150 Ziegler

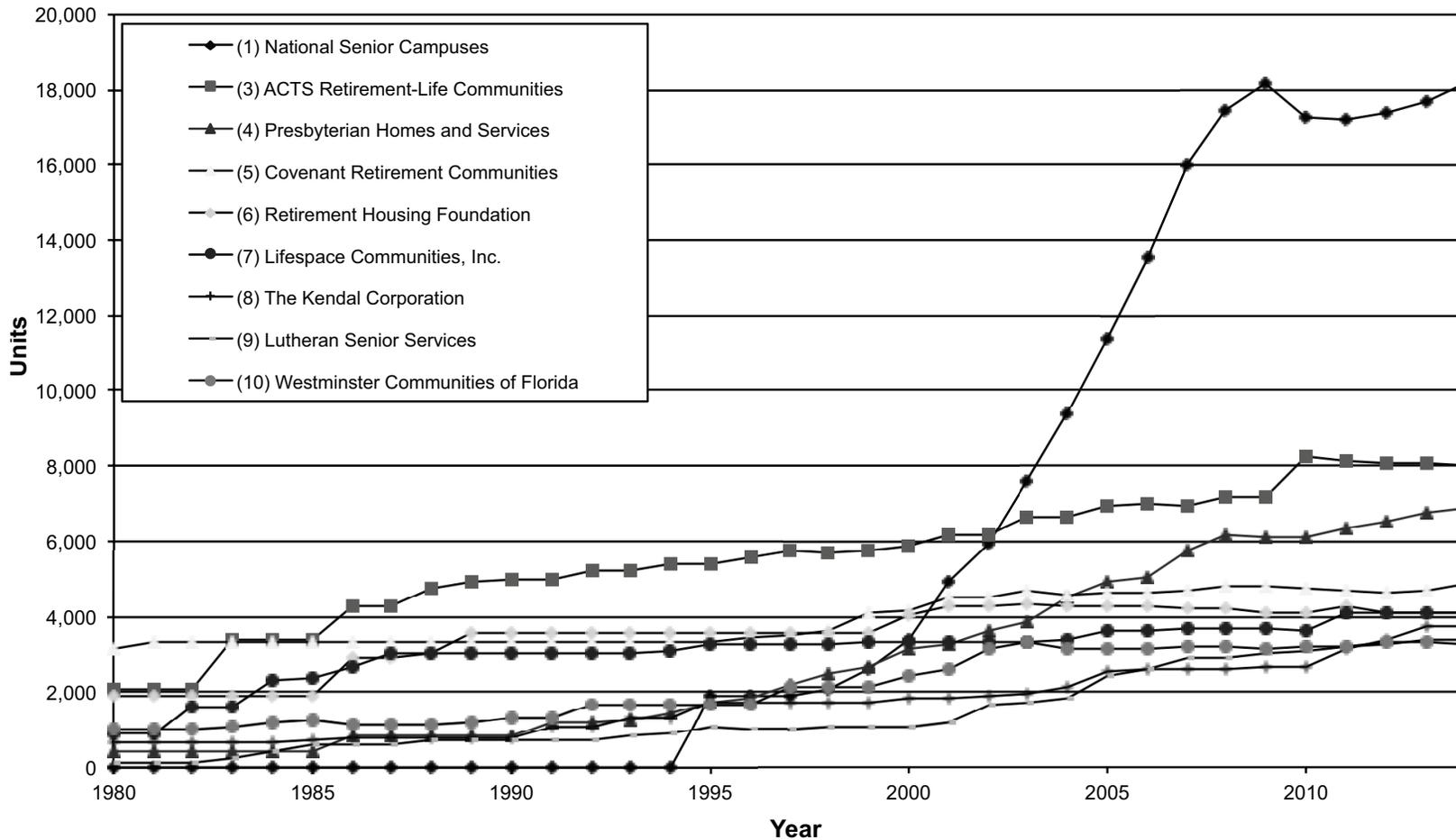
5-1 2015 LeadingAge Ziegler 150

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



5-2 2015 LeadingAge Ziegler 150

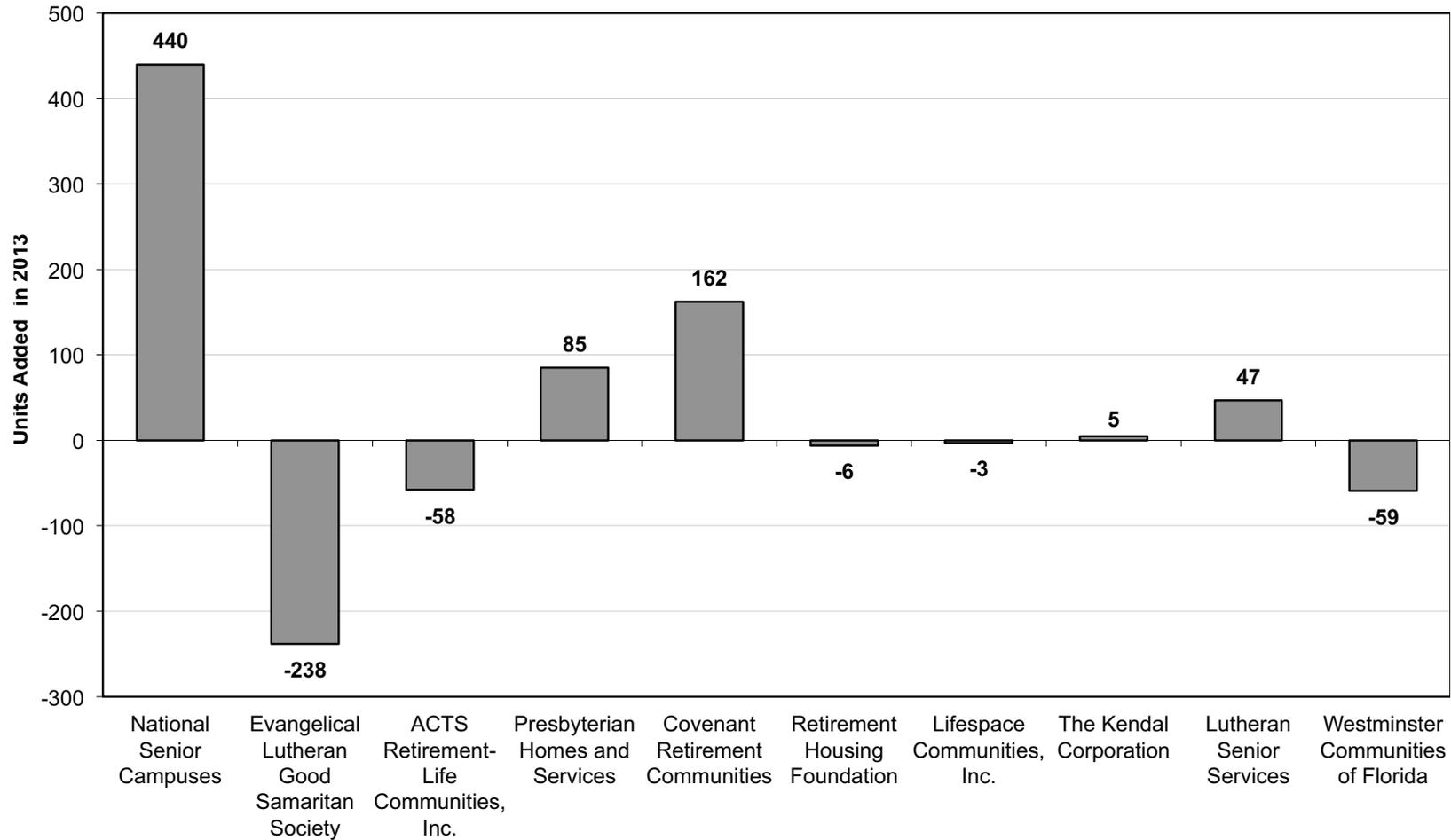
Growth: Growth of Total Senior Living Units for Largest 10 Systems
5-2a 1980 (Excludes Evangelical Lutheran Good Samaritan Society)



LeadingAge 150 Ziegler

5-3 2015 LeadingAge Ziegler 150

Growth: Rate of Growth for Largest 10 Systems

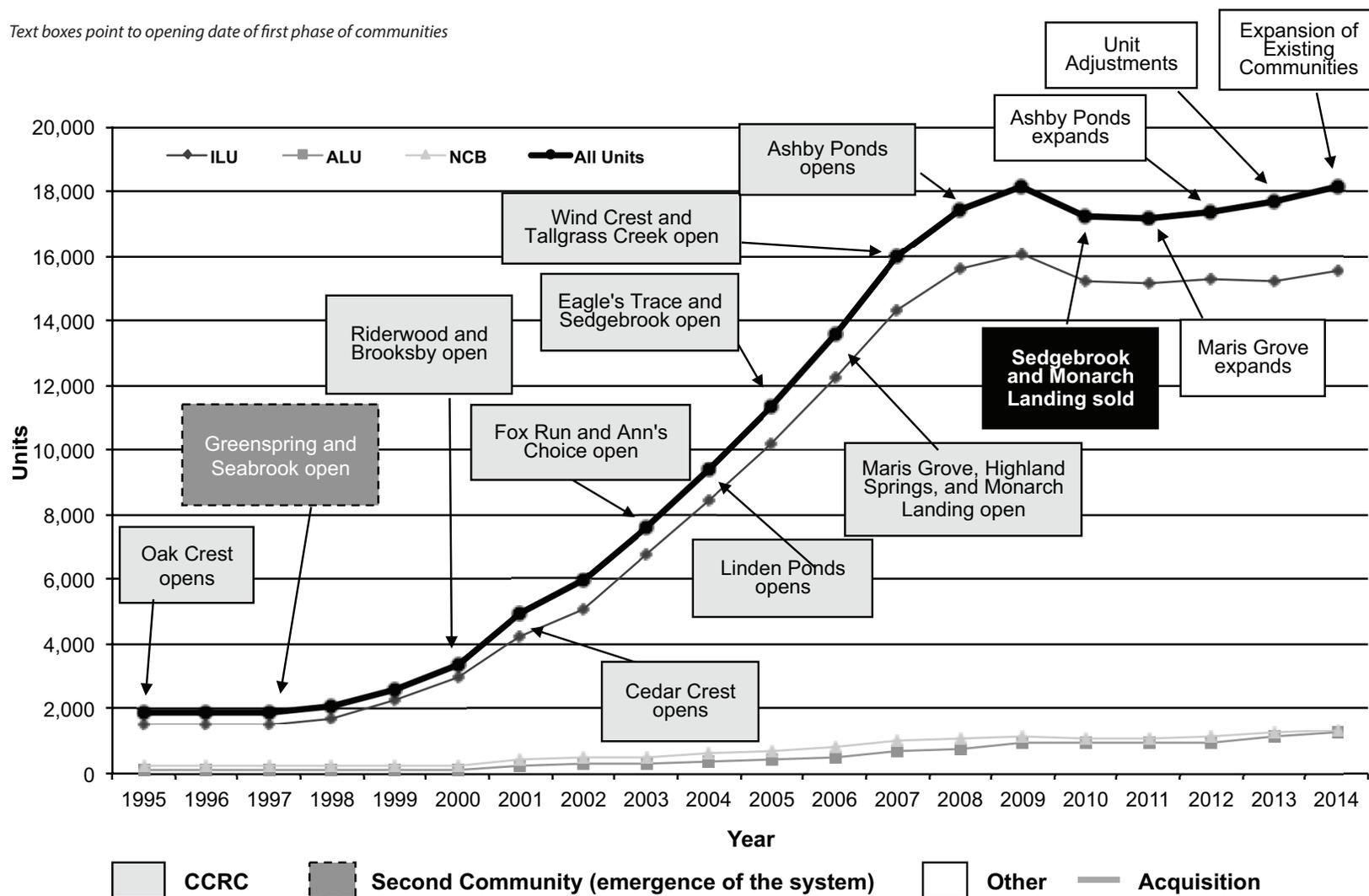


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4a NATIONAL SENIOR CAMPUSES (MD)

Text boxes point to opening date of first phase of communities

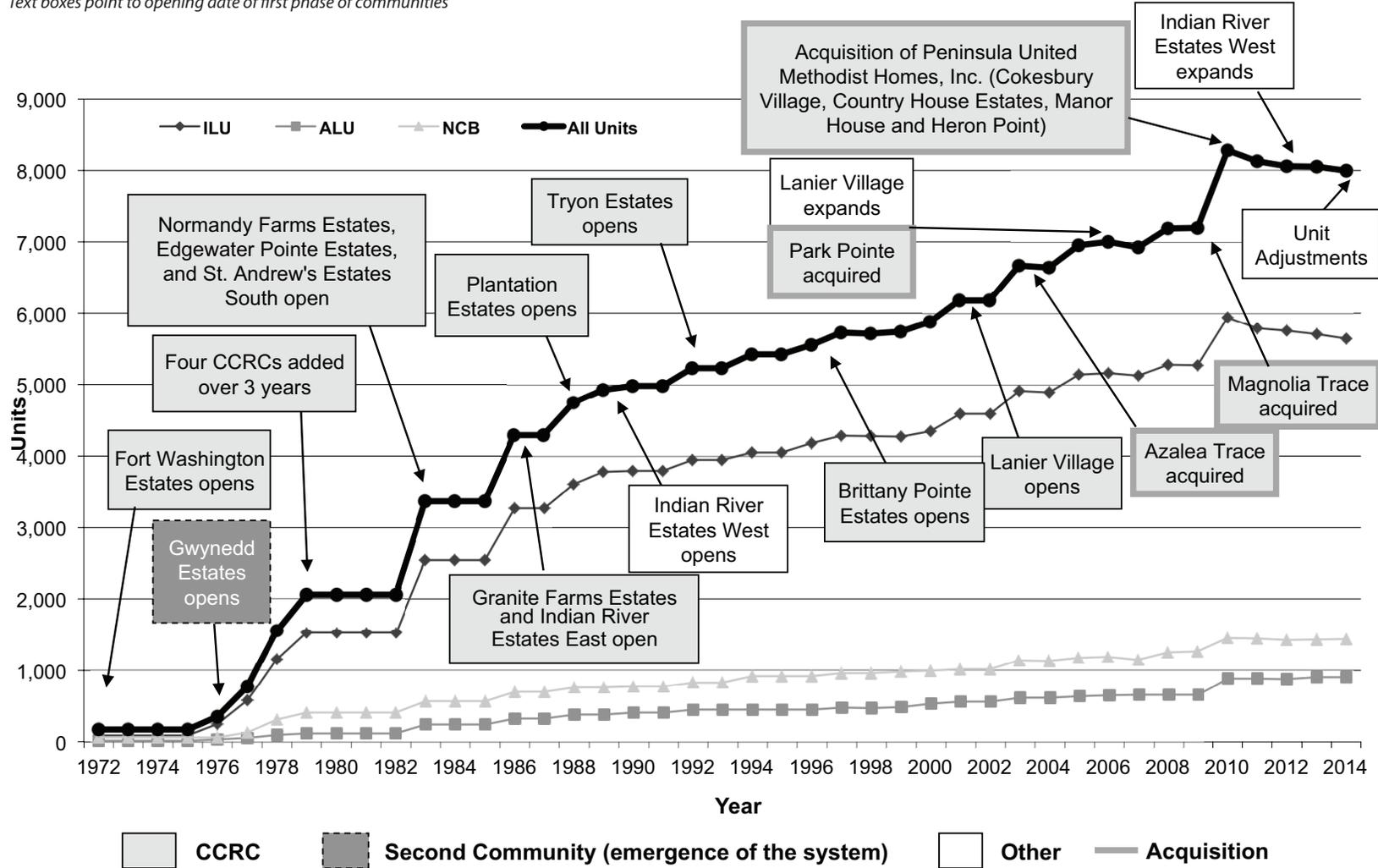


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

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

Text boxes point to opening date of first phase of communities



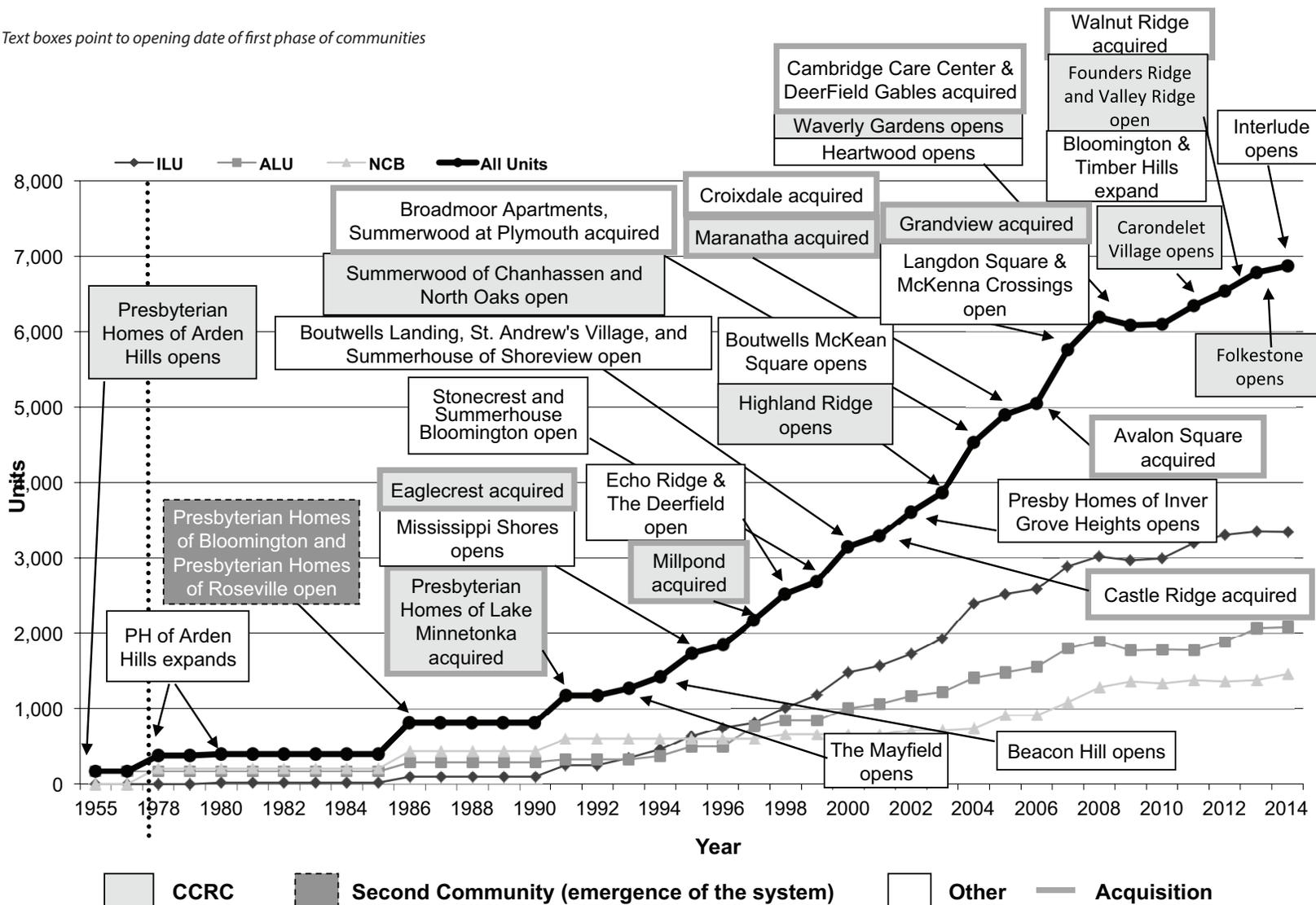
LeadingAge 150 Ziegler

5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4c PRESBYTERIAN HOMES AND SERVICES (MN)

Text boxes point to opening date of first phase of communities

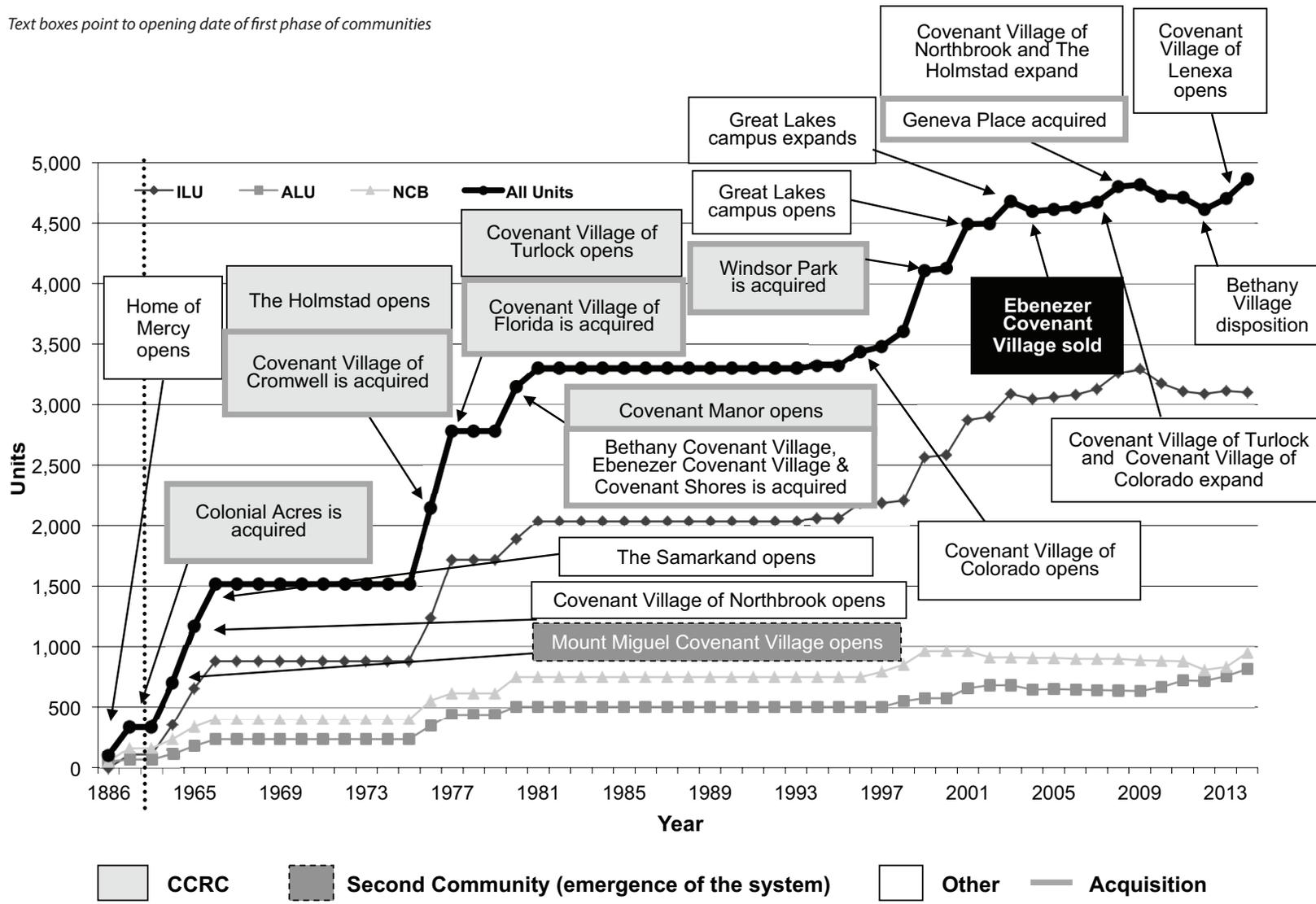


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4d COVENANT RETIREMENT COMMUNITIES (IL)

Text boxes point to opening date of first phase of communities

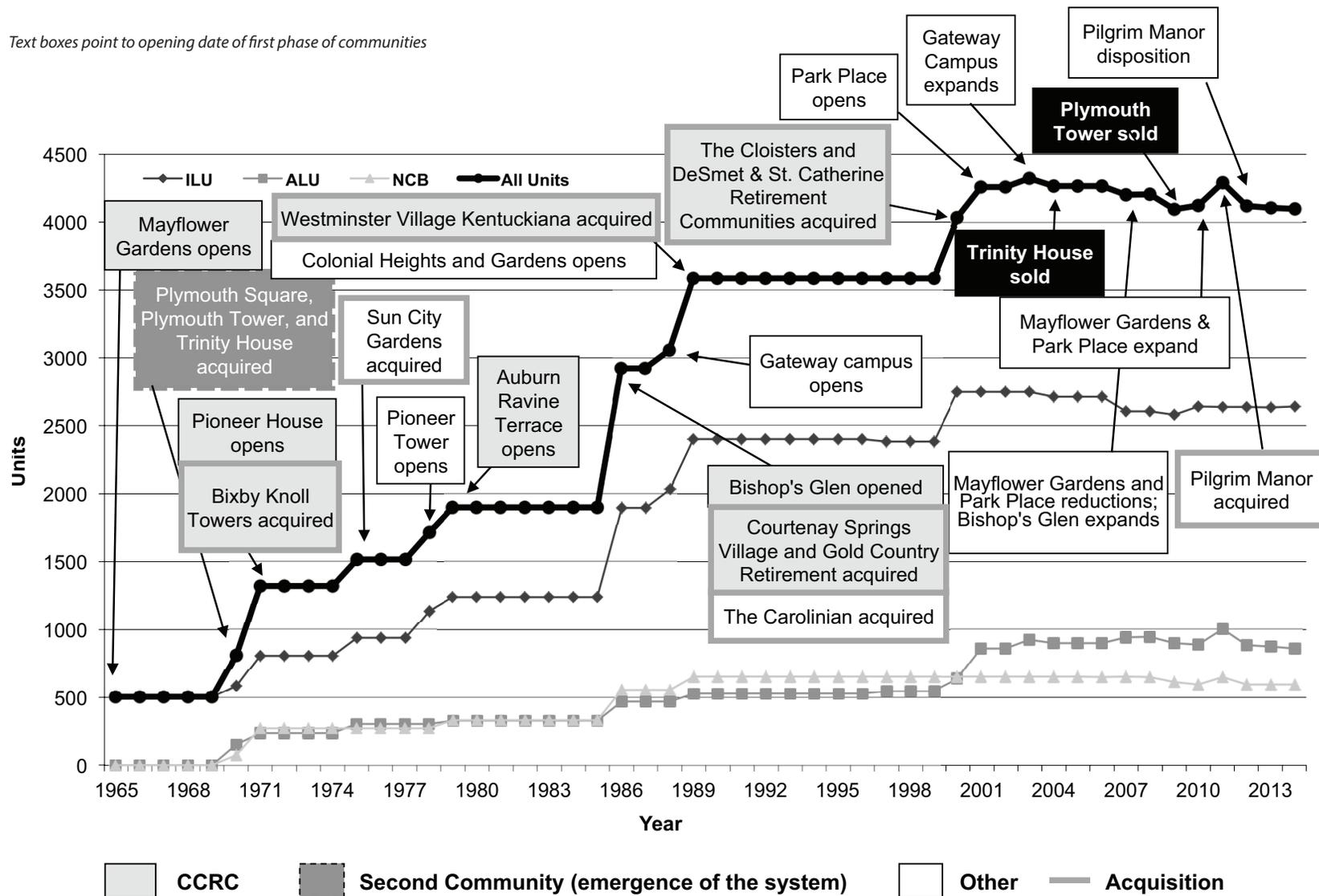


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4e RETIREMENT HOUSING FOUNDATION (CA)

Text boxes point to opening date of first phase of communities

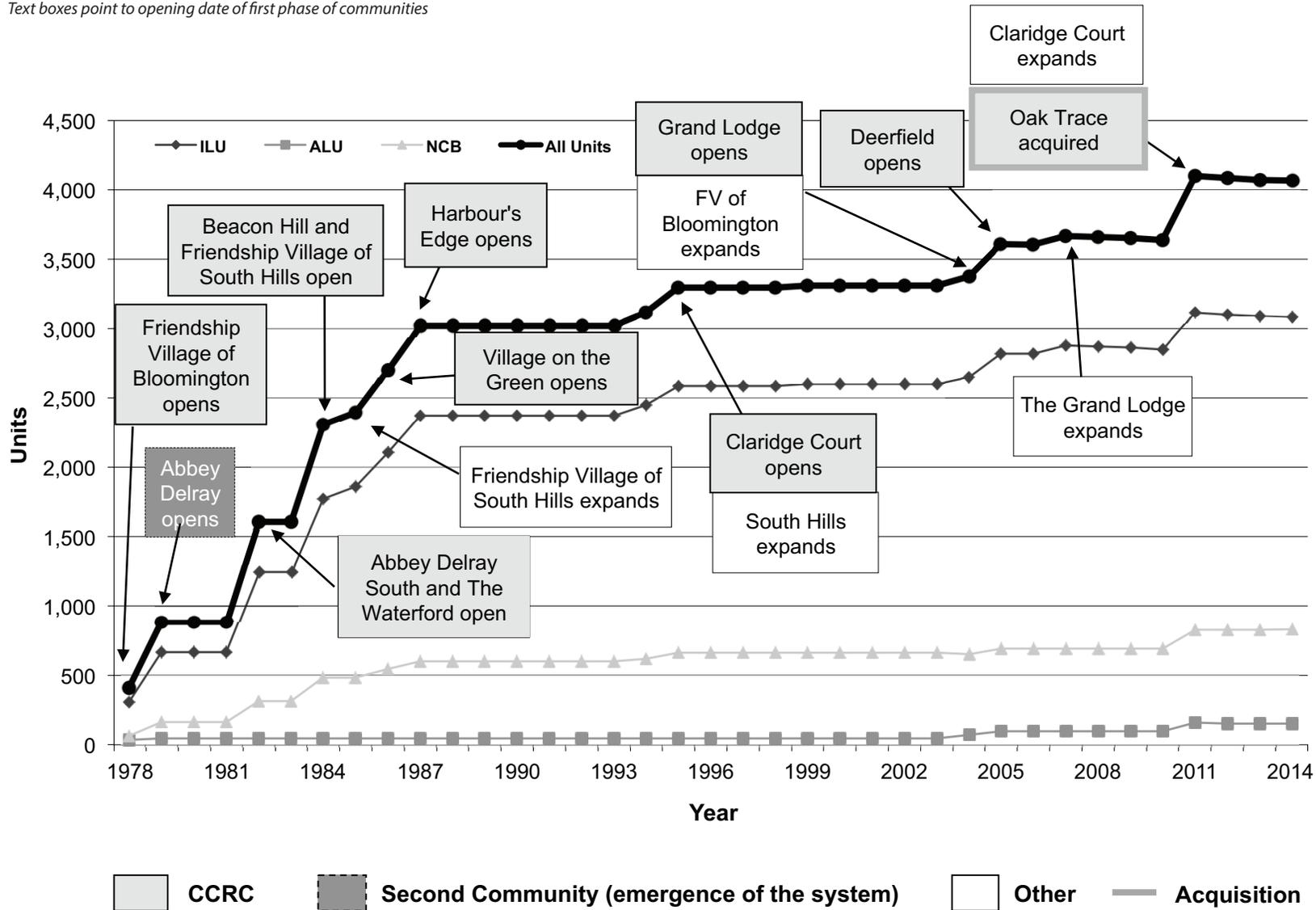


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

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

Text boxes point to opening date of first phase of communities



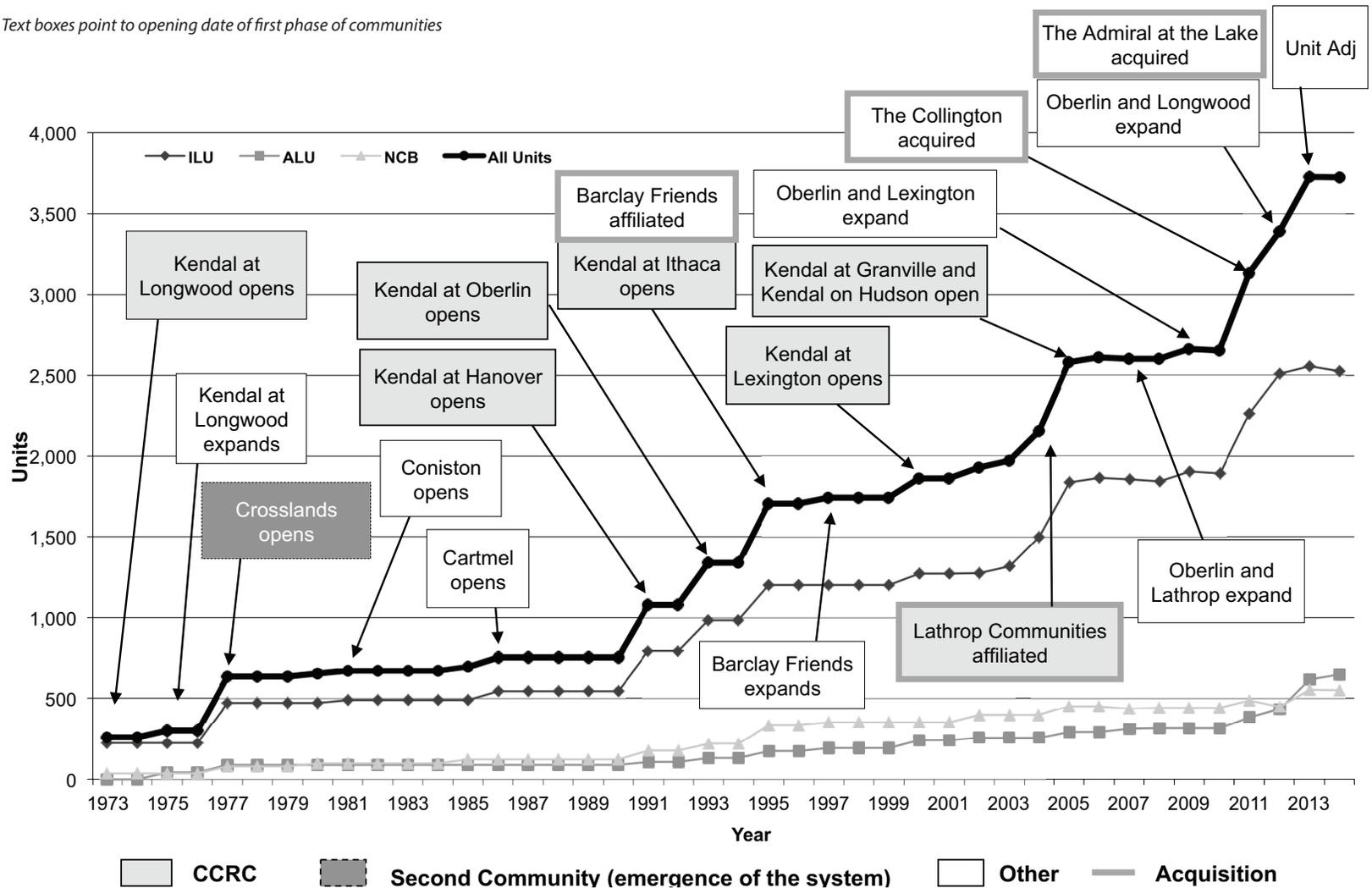
LeadingAge 150 Ziegler

5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4g THE KENDAL CORPORATION (PA)

Text boxes point to opening date of first phase of communities

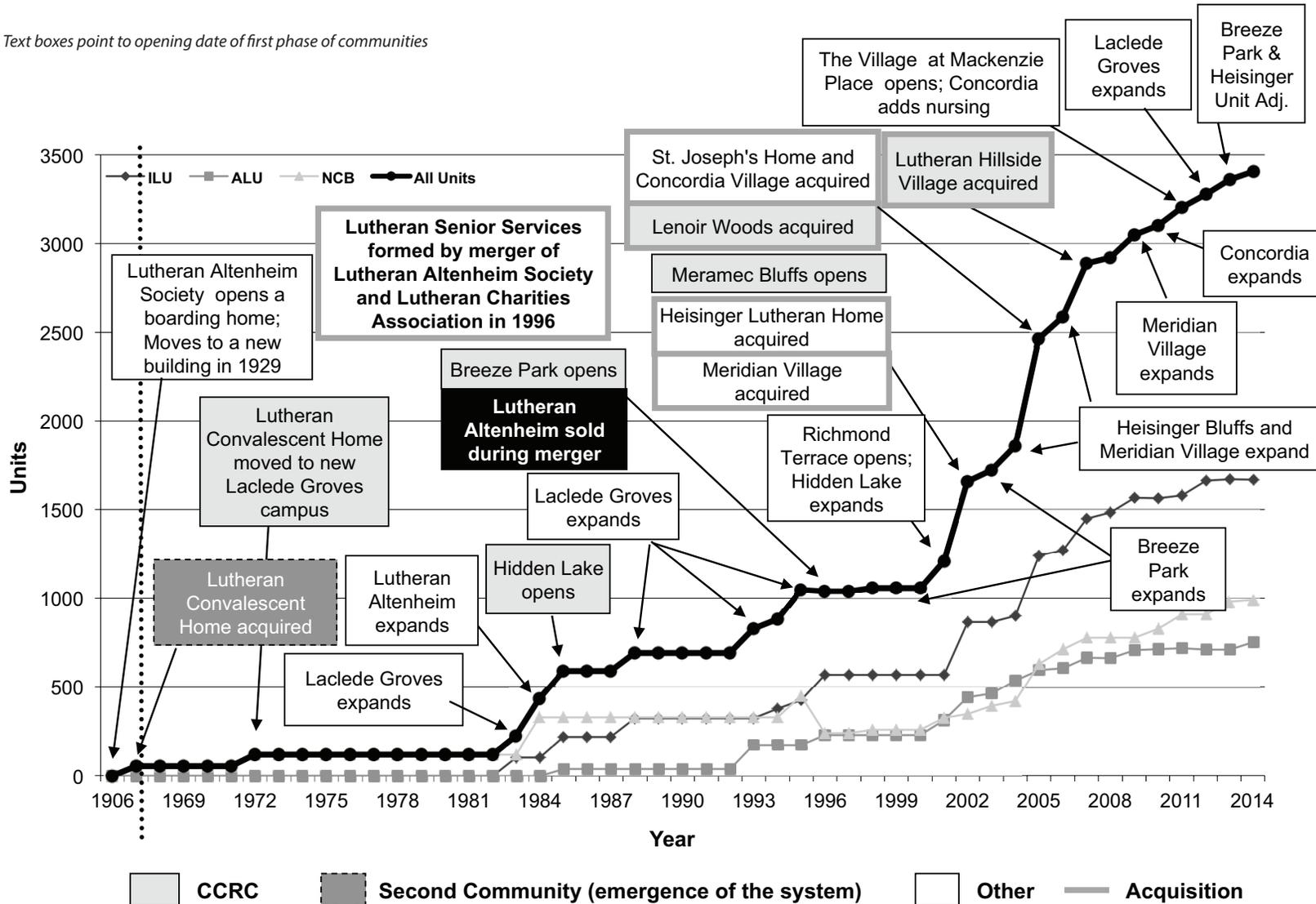


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4h LUTHERAN SENIOR SERVICES (MO)

Text boxes point to opening date of first phase of communities



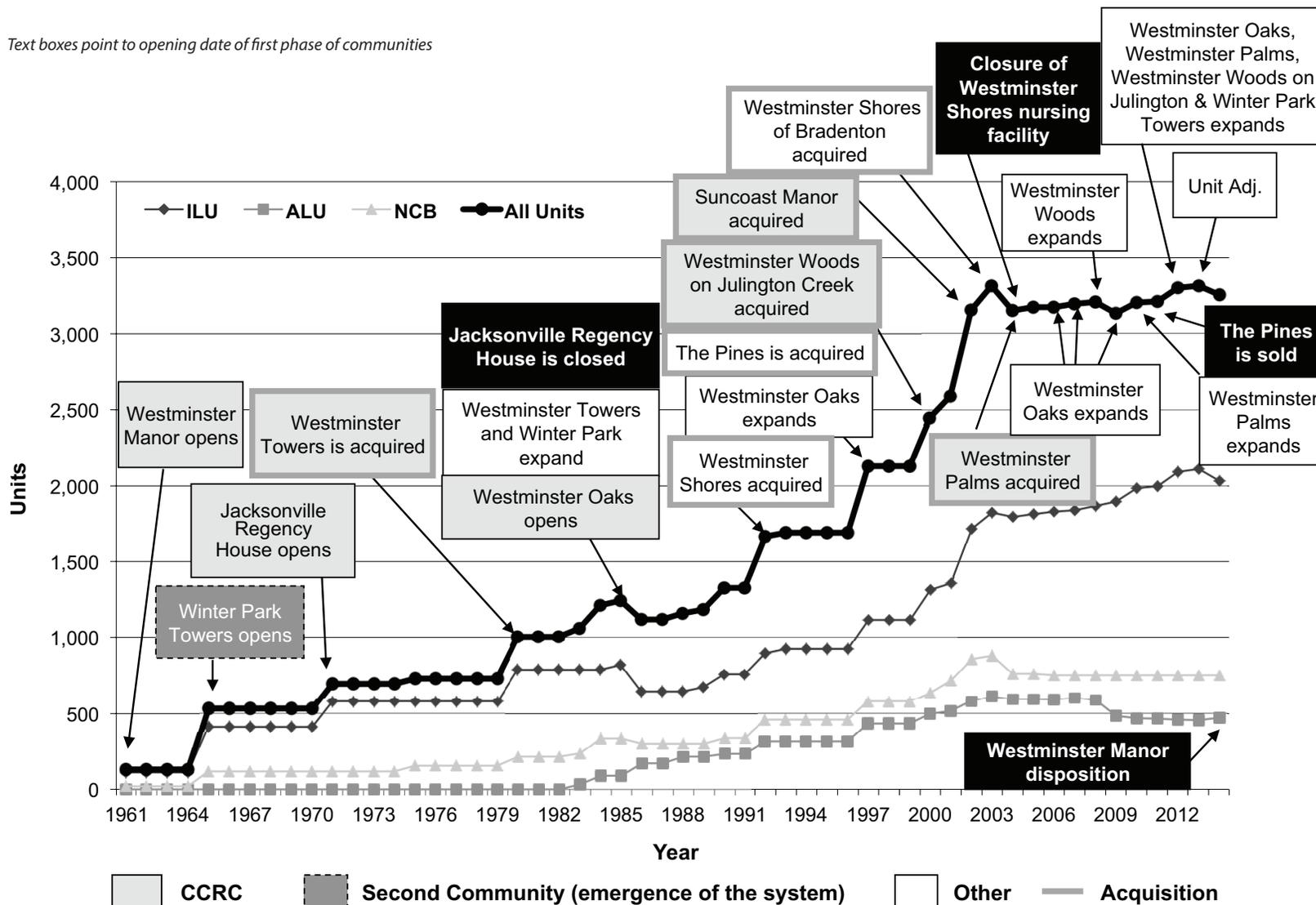
LeadingAge 150 Ziegler

5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4i WESTMINSTER COMMUNITIES OF FLORIDA (FL)

Text boxes point to opening date of first phase of communities

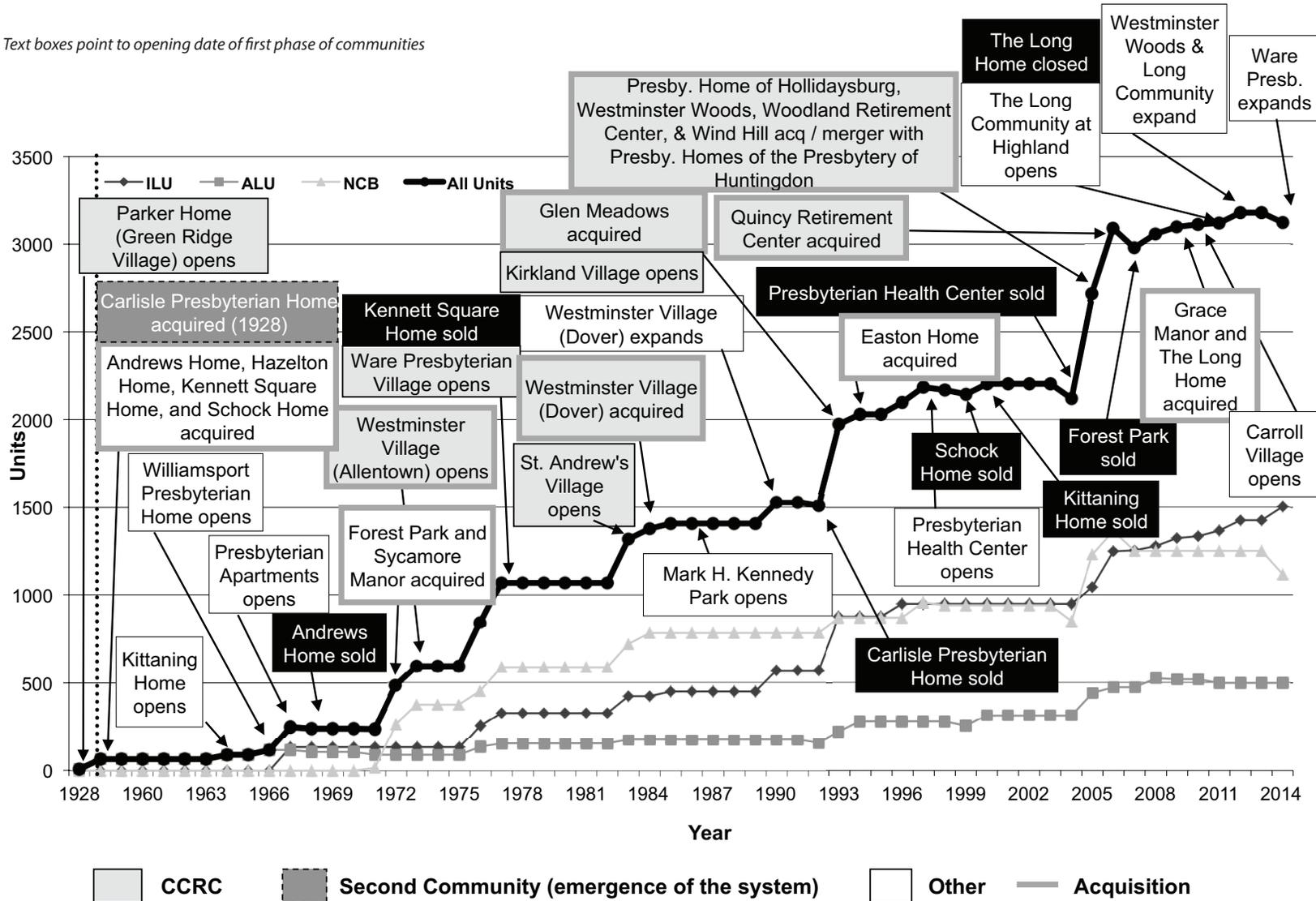


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4j PRESBYTERIAN SENIOR LIVING (PA)

Text boxes point to opening date of first phase of communities



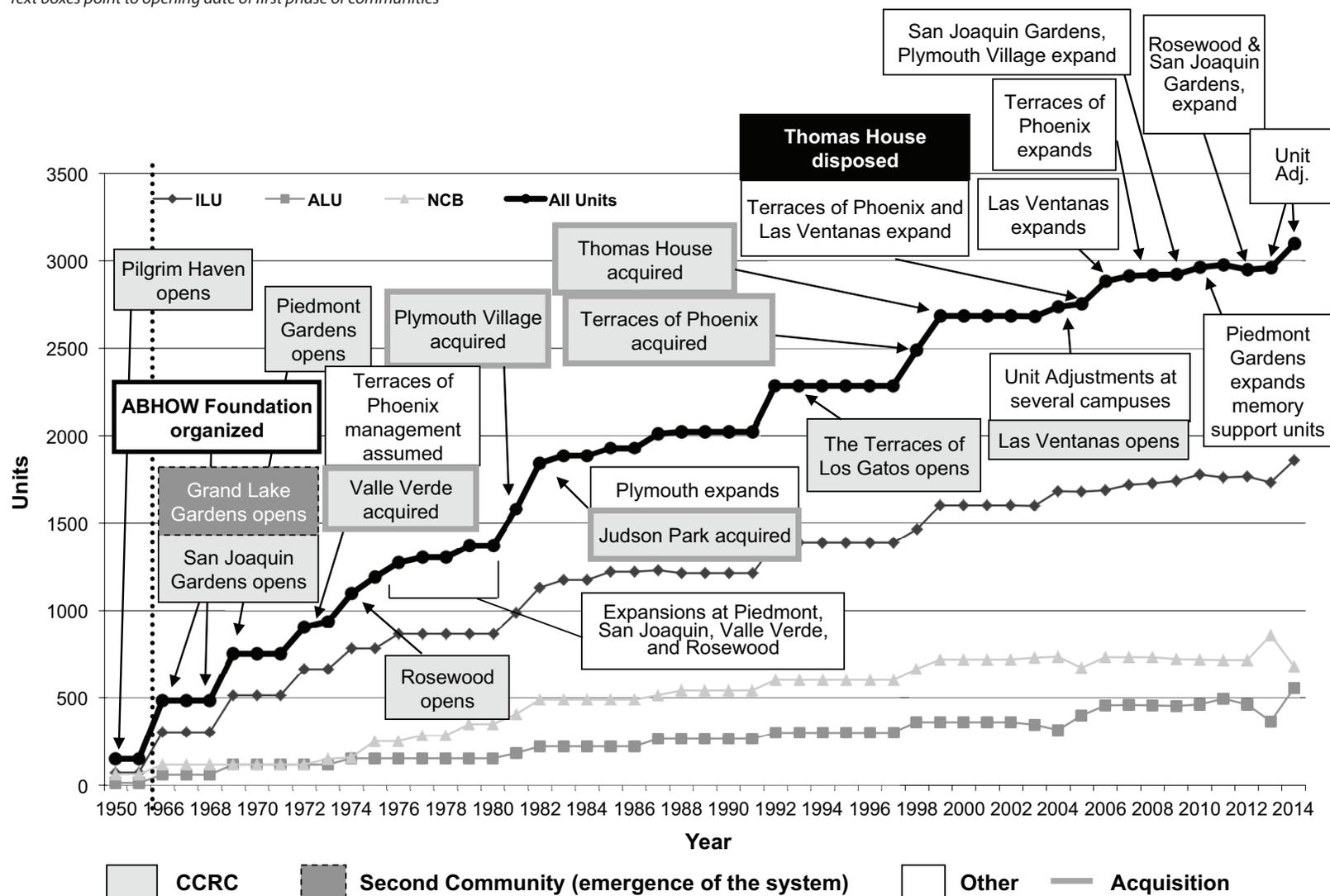
LeadingAge 150 Ziegler

5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4k CORNERSTONE AFFILIATES (CA)

Text boxes point to opening date of first phase of communities

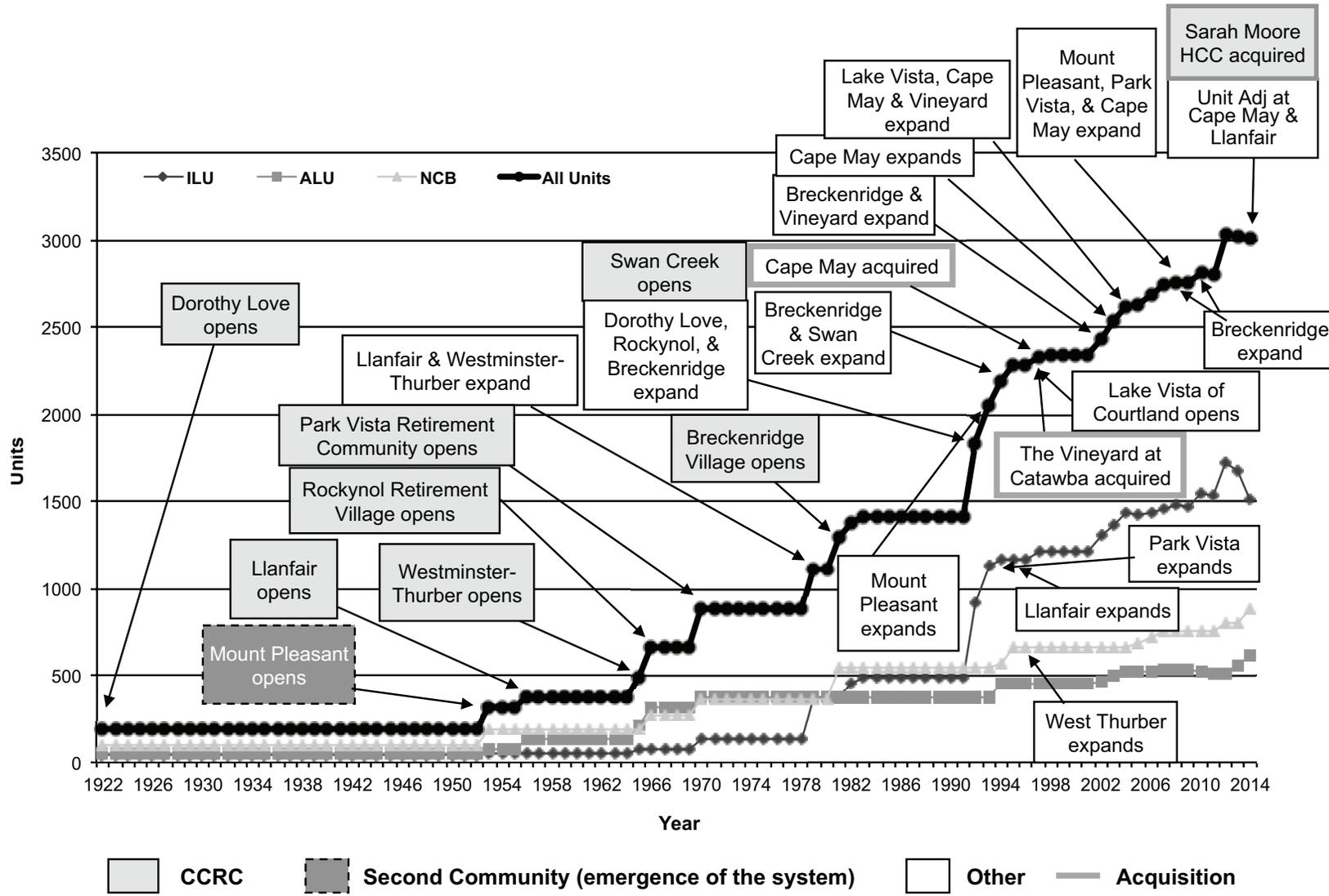


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4I OHIO PRESBYTERIAN RETIREMENT SERVICES (OH)

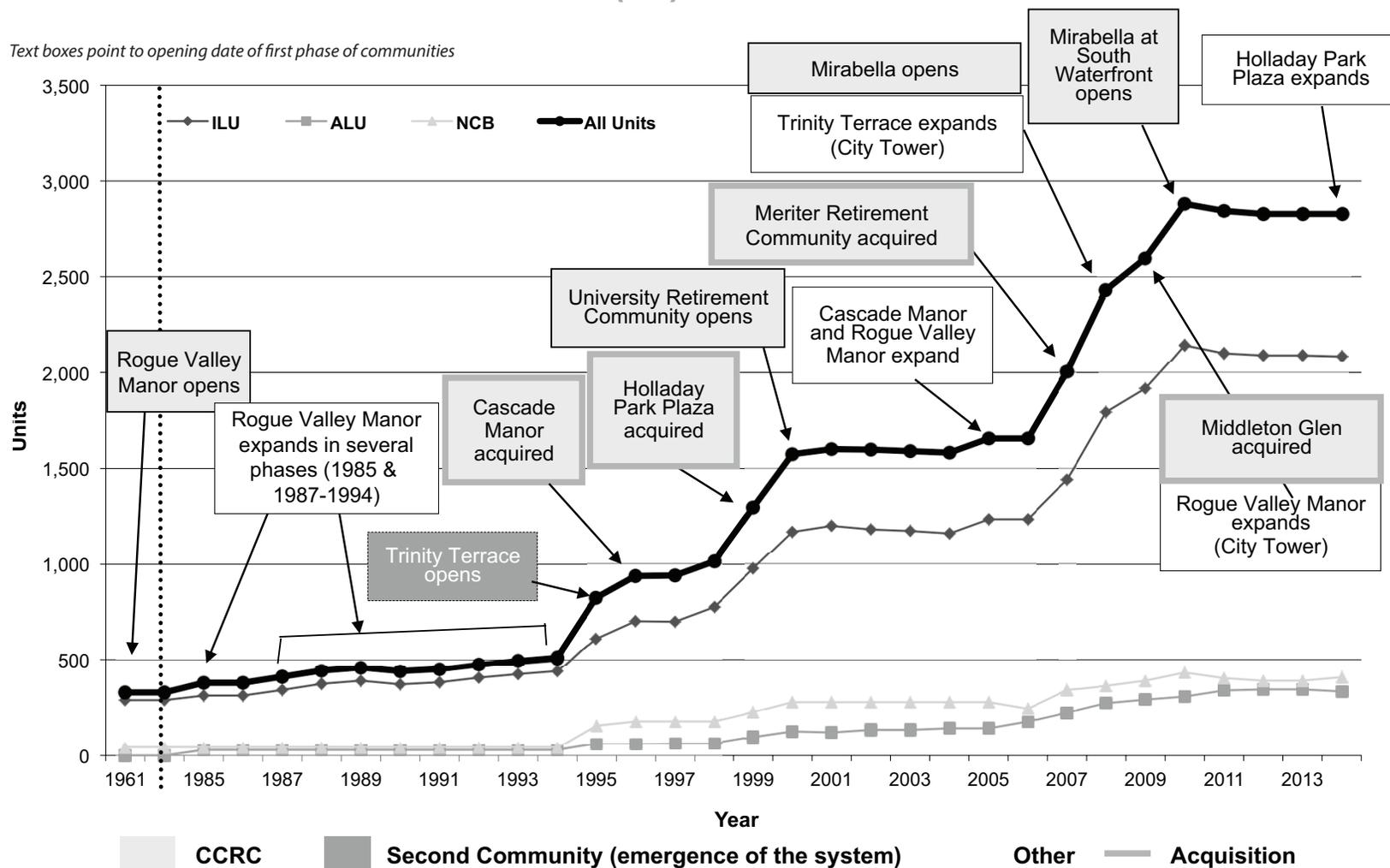
Text boxes point to opening date of first phase of communities



5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4m PACIFIC RETIREMENT SERVICES (OR)

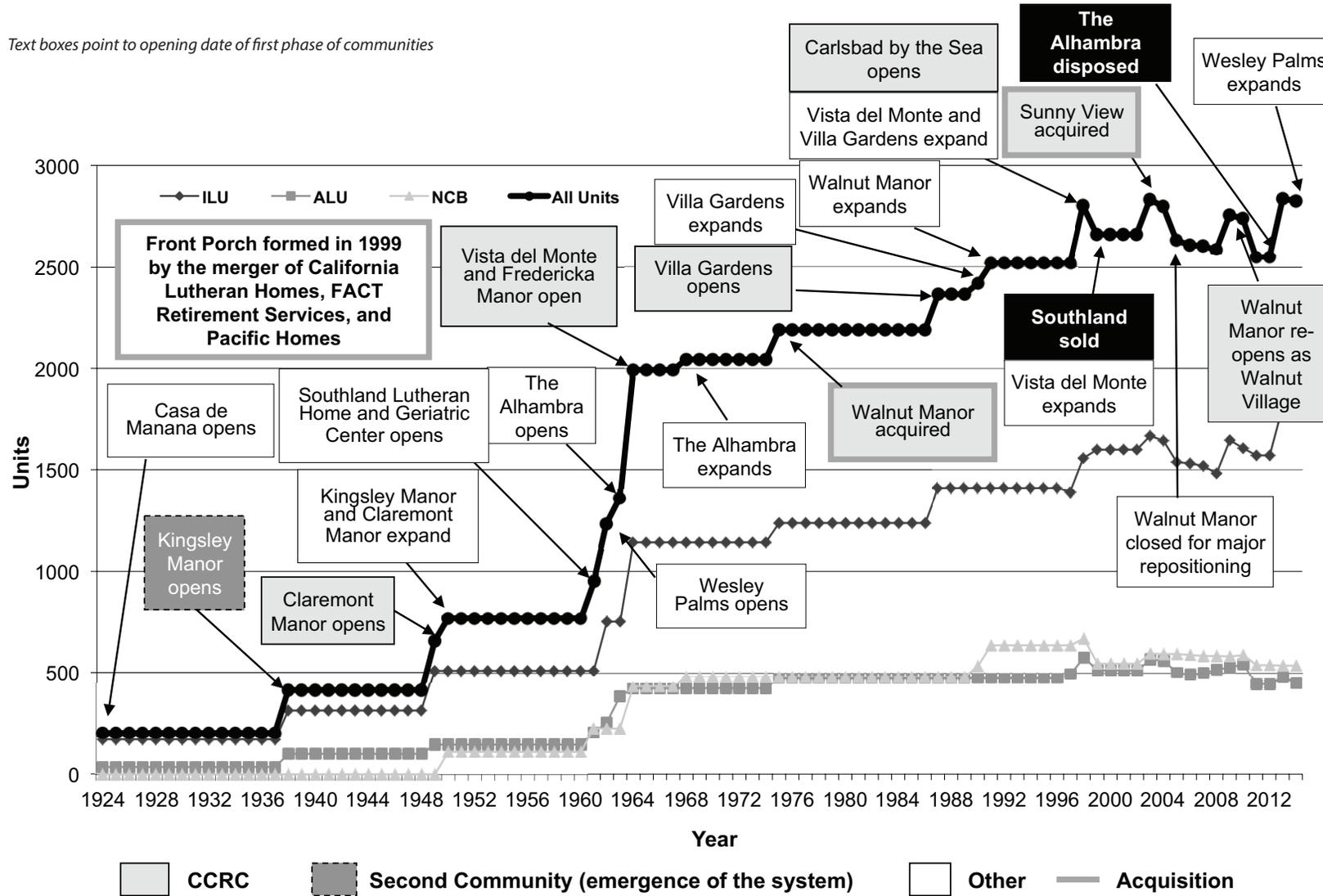


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4n FRONT PORCH COMMUNITIES AND SERVICES (CA)

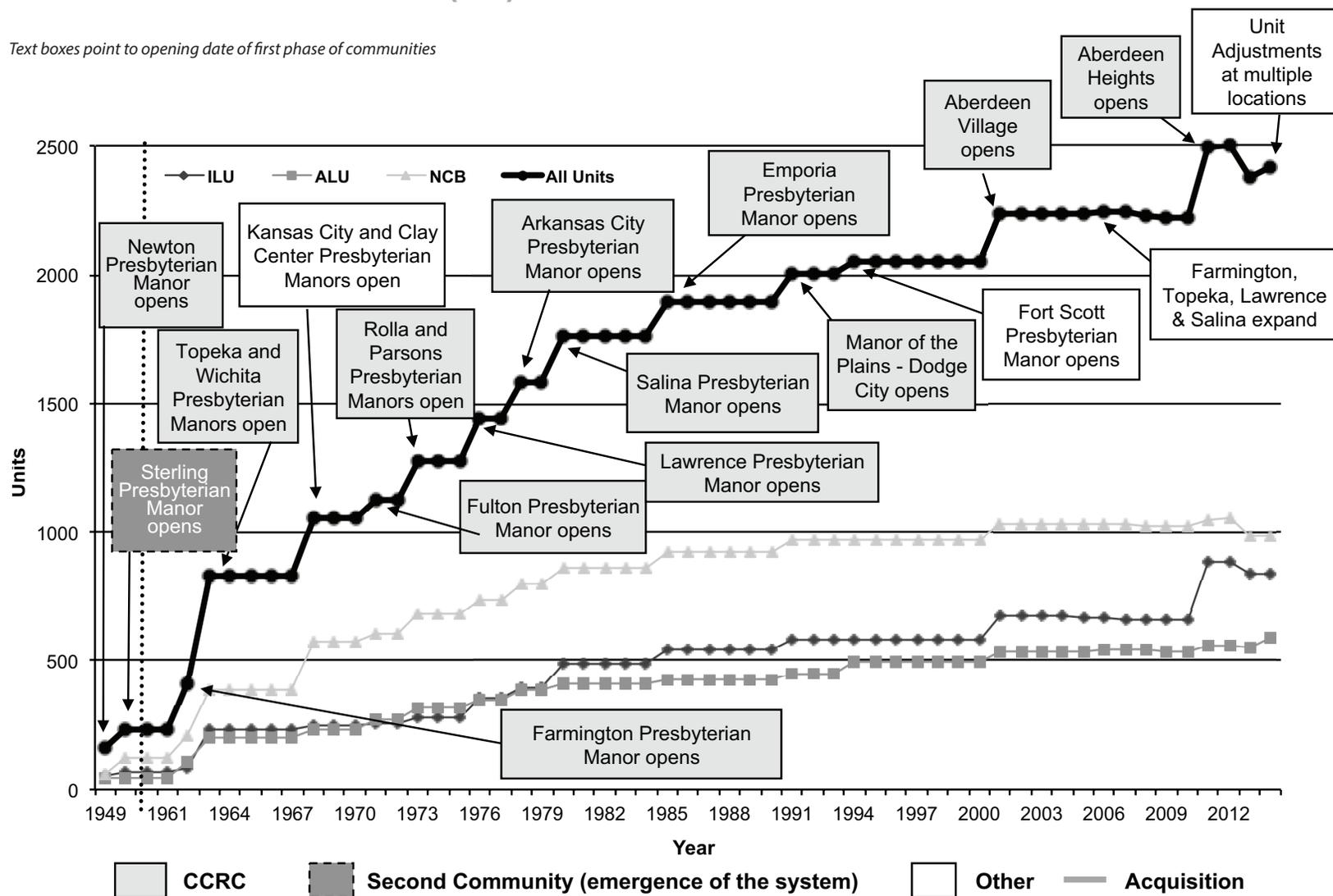
Text boxes point to opening date of first phase of communities



5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth 5-4o ASBURY COMMUNITIES (MD)

Text boxes point to opening date of first phase of communities

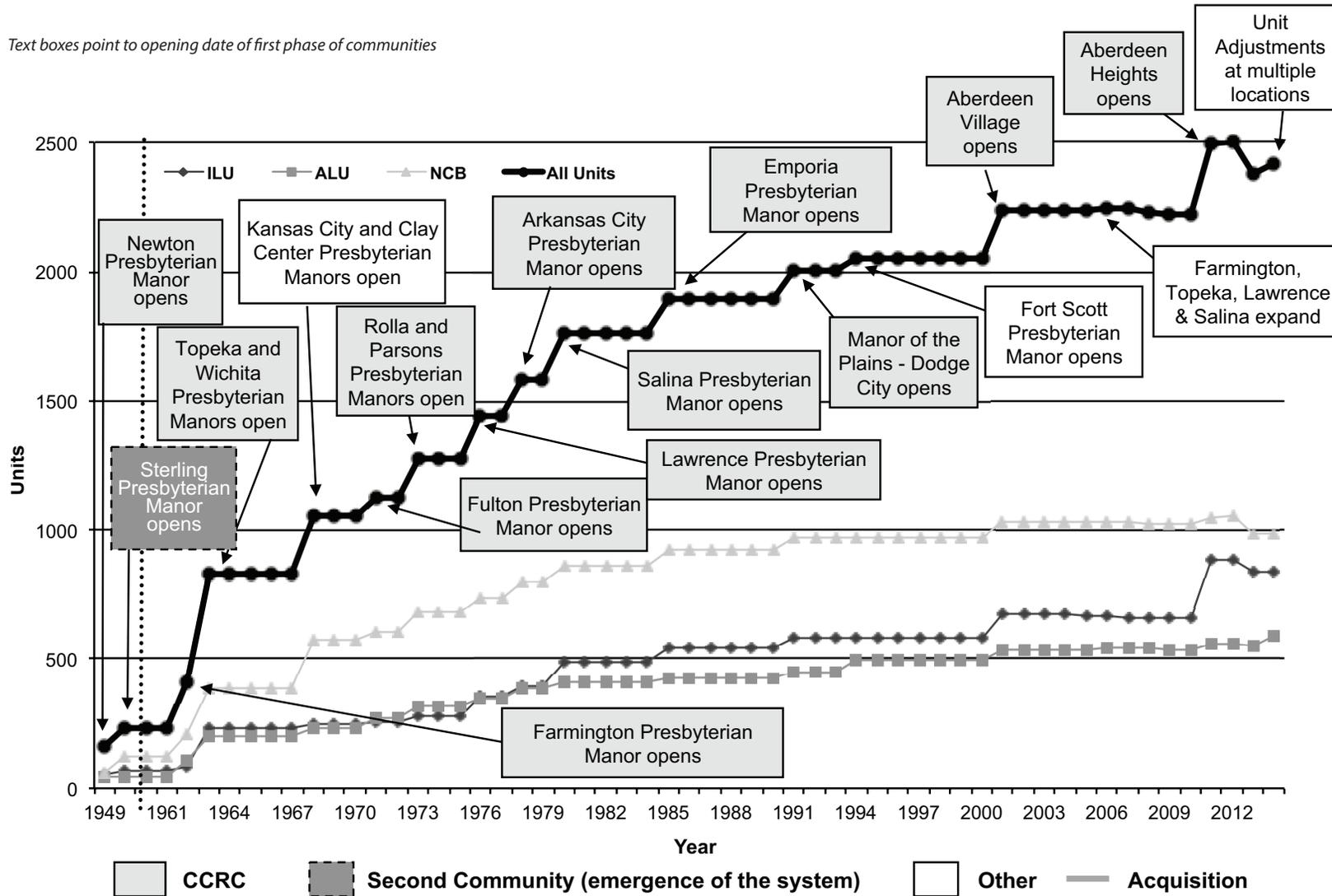


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

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

Text boxes point to opening date of first phase of communities

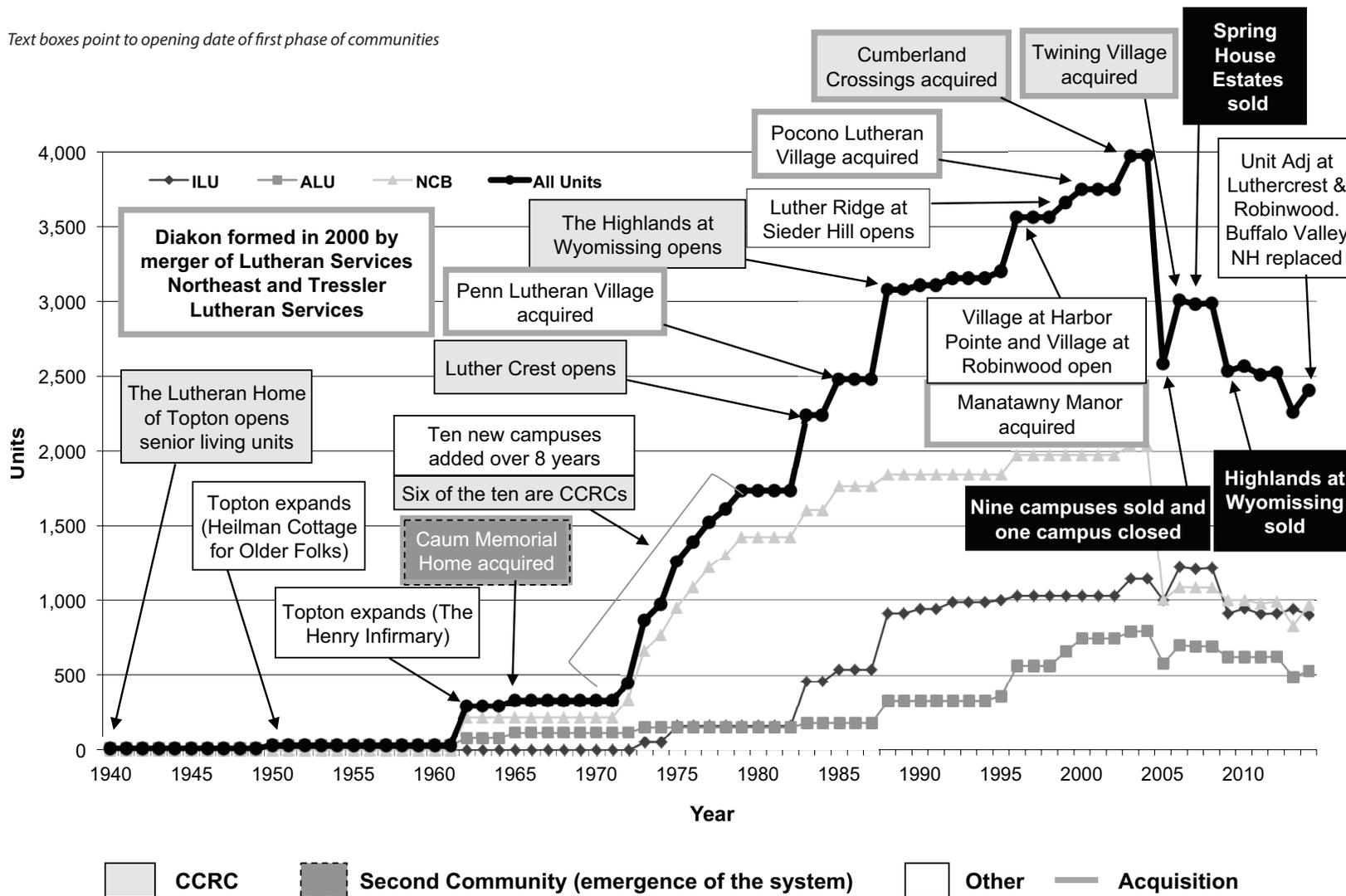


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4q DIAKON LUTHERAN SOCIAL MINISTRIES (PA)

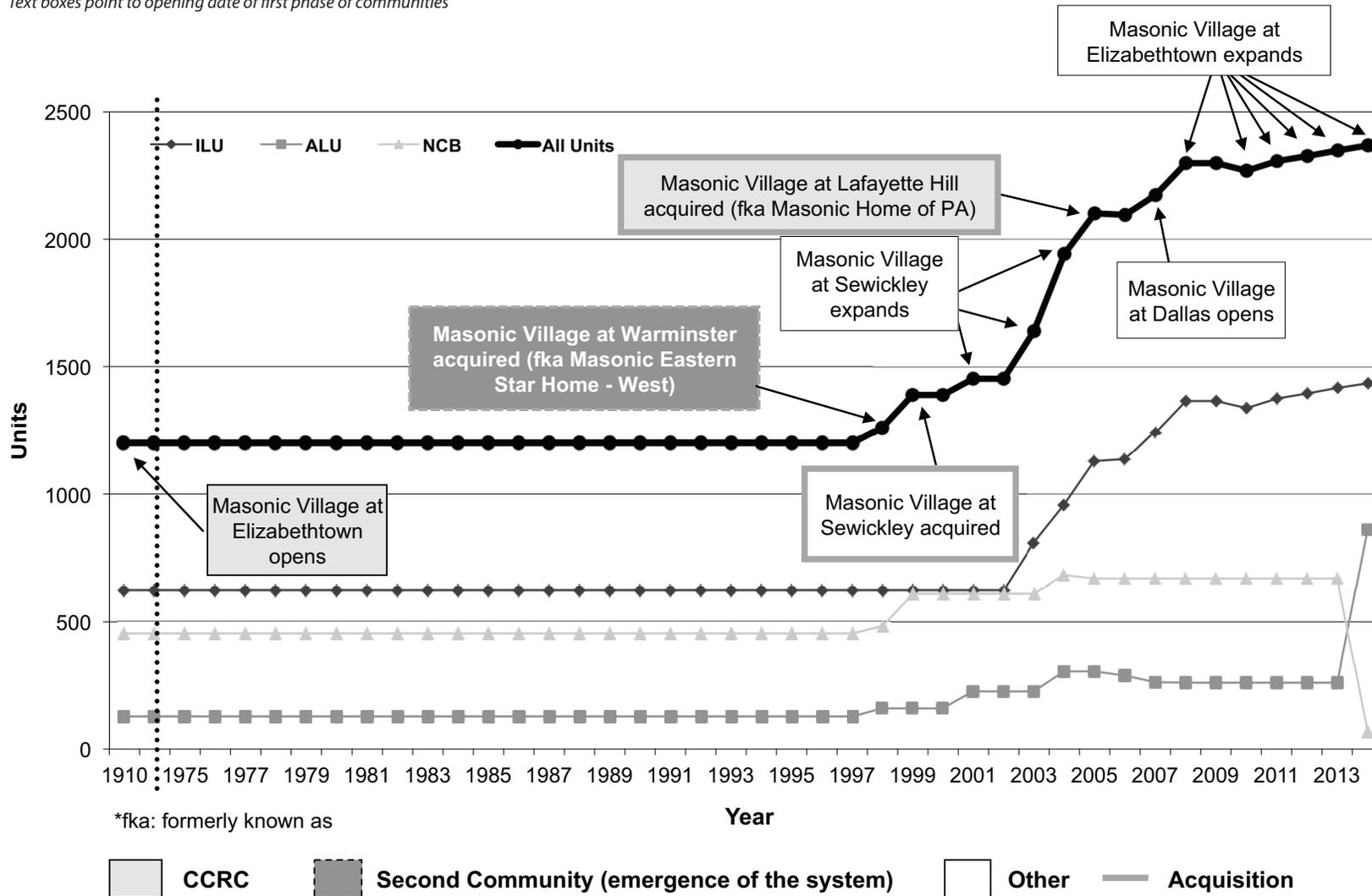
Text boxes point to opening date of first phase of communities



5-4 2015 LeadingAge Ziegler 150

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

Text boxes point to opening date of first phase of communities

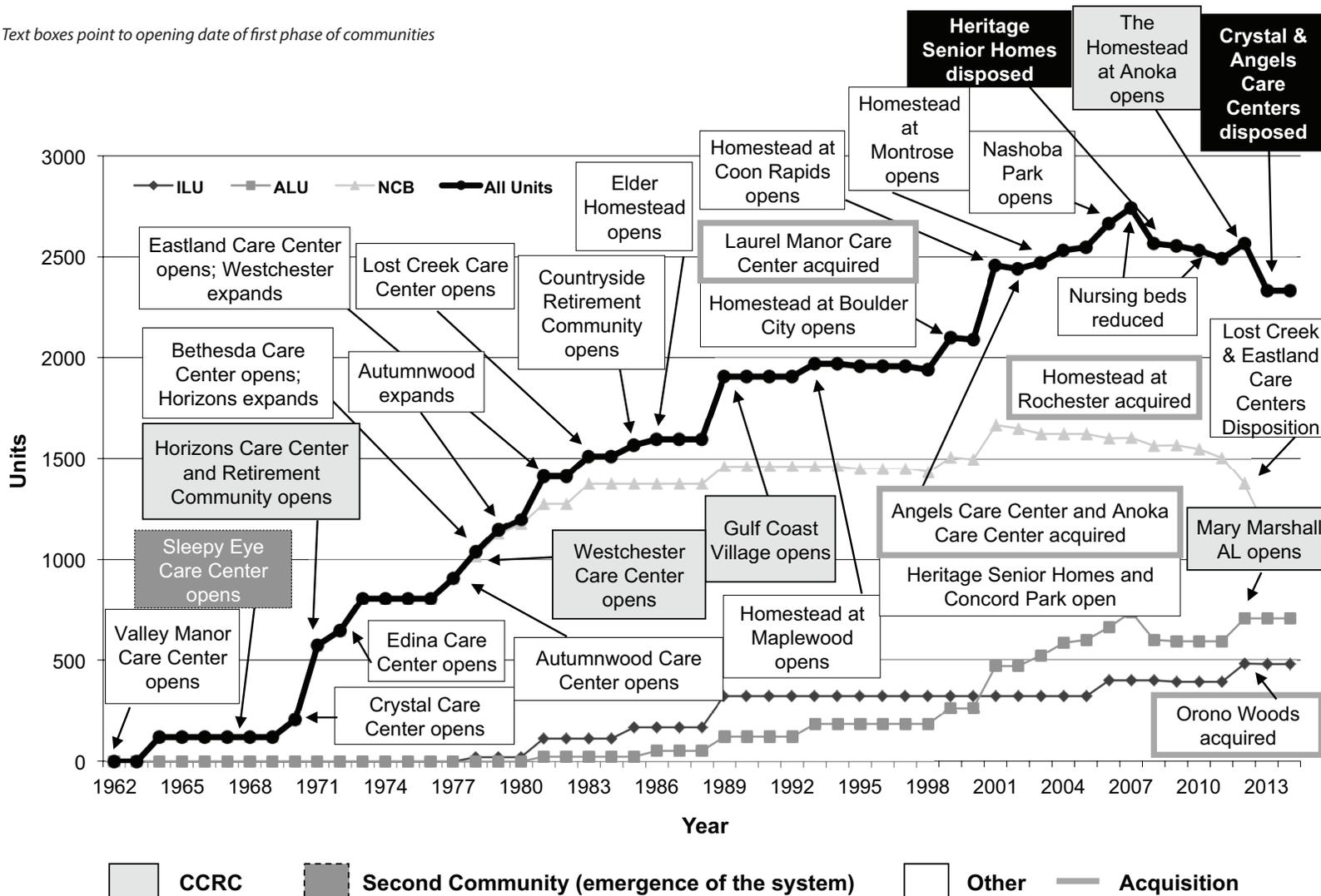


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4s VOLUNTEERS OF AMERICA (VA)

Text boxes point to opening date of first phase of communities

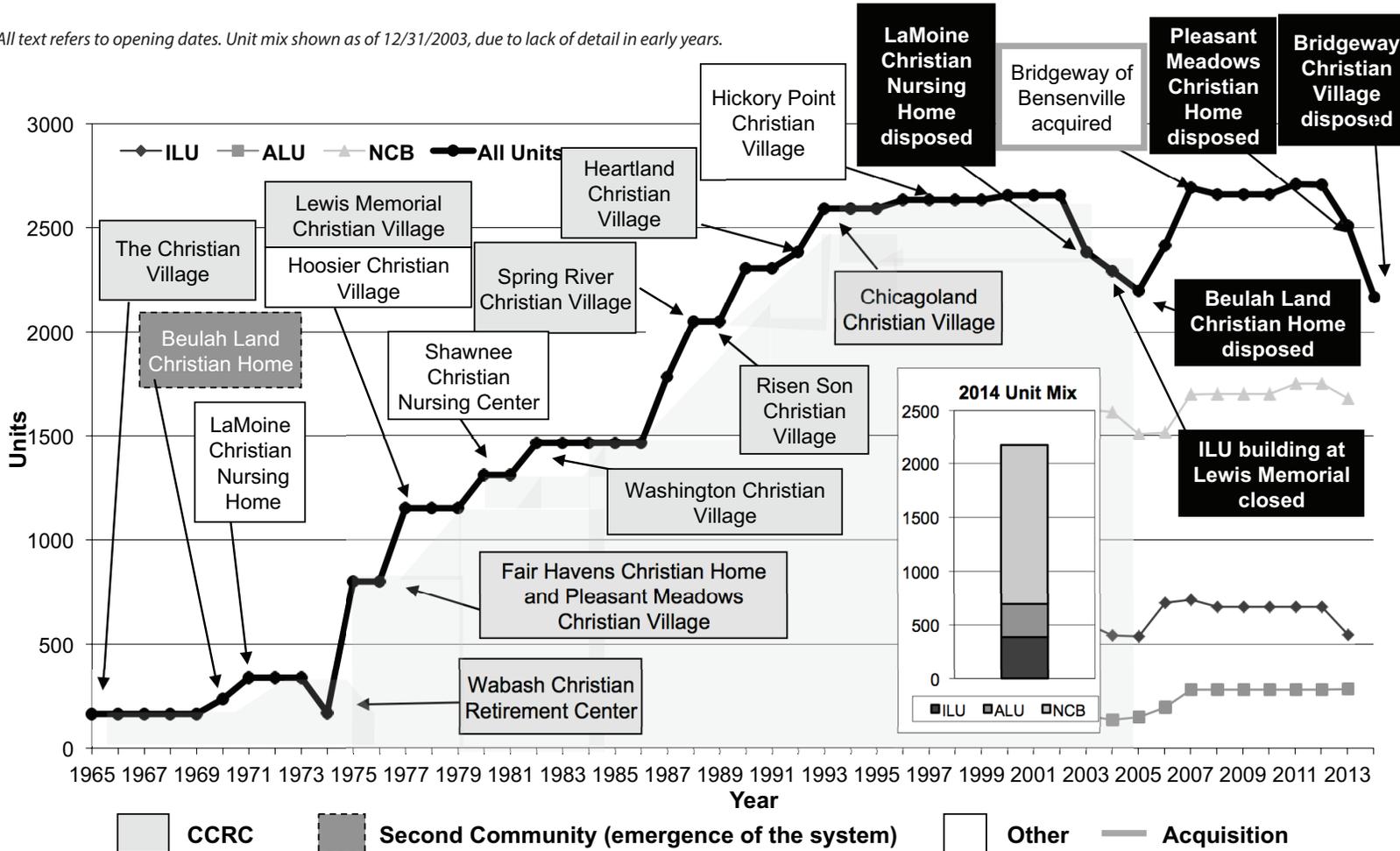


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4t CHRISTIAN HOMES, INC (IL)

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



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

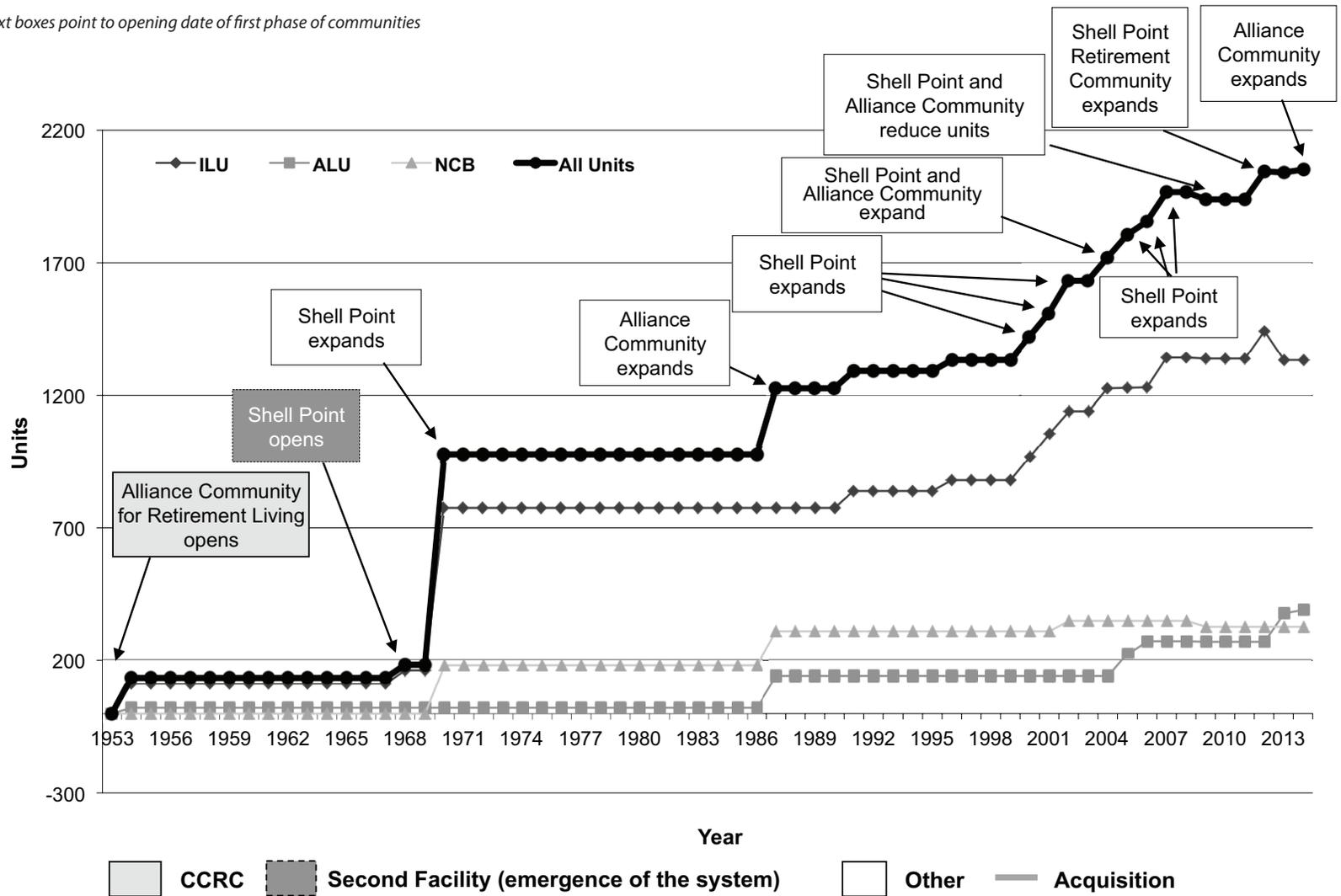
LeadingAge 150 Ziegler

5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4u SHELL POINT RETIREMENT COMMUNITY (FL)

Text boxes point to opening date of first phase of communities

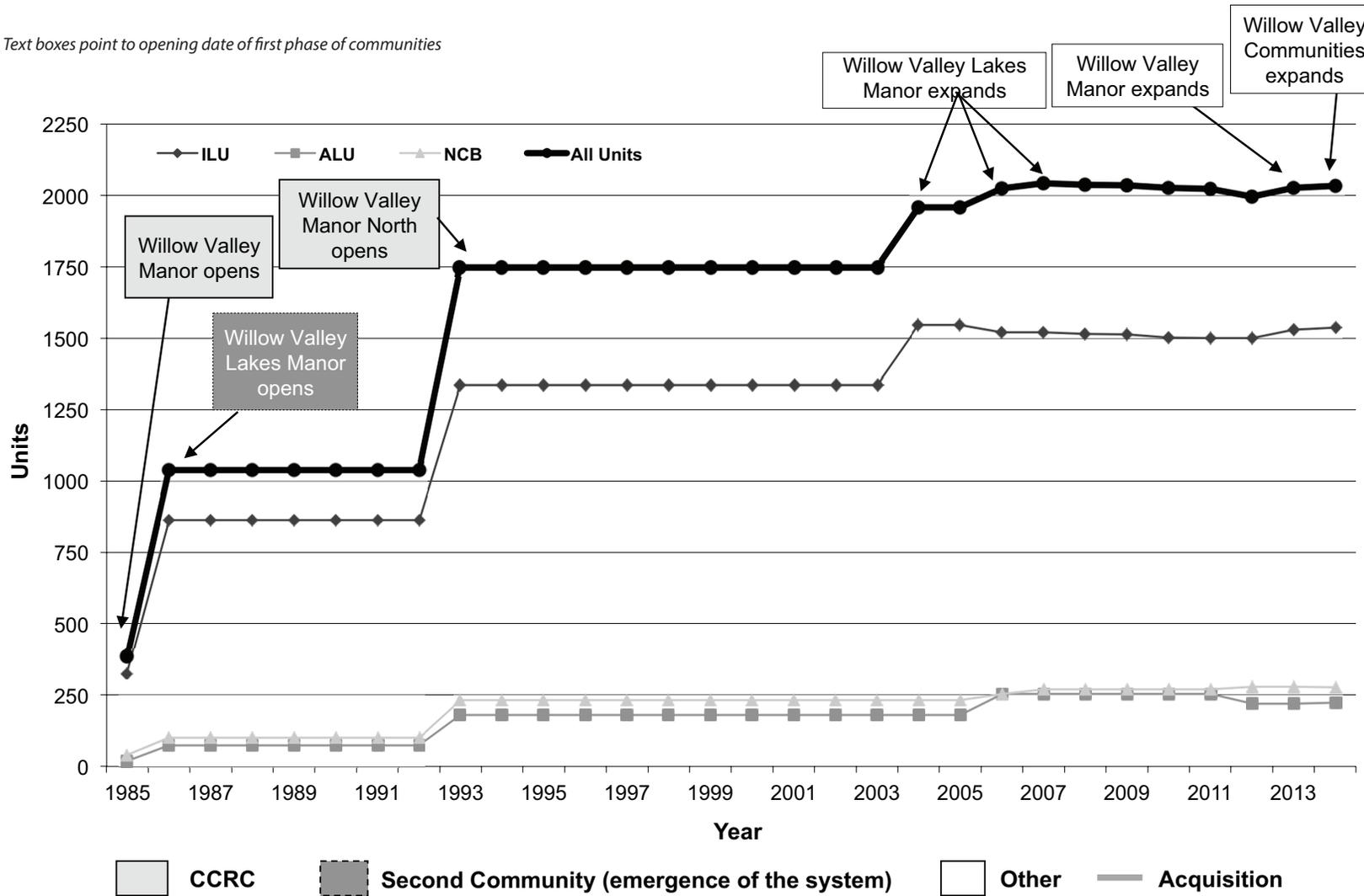


5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

5-4v WILLOW VALLEY COMMUNITIES (PA)

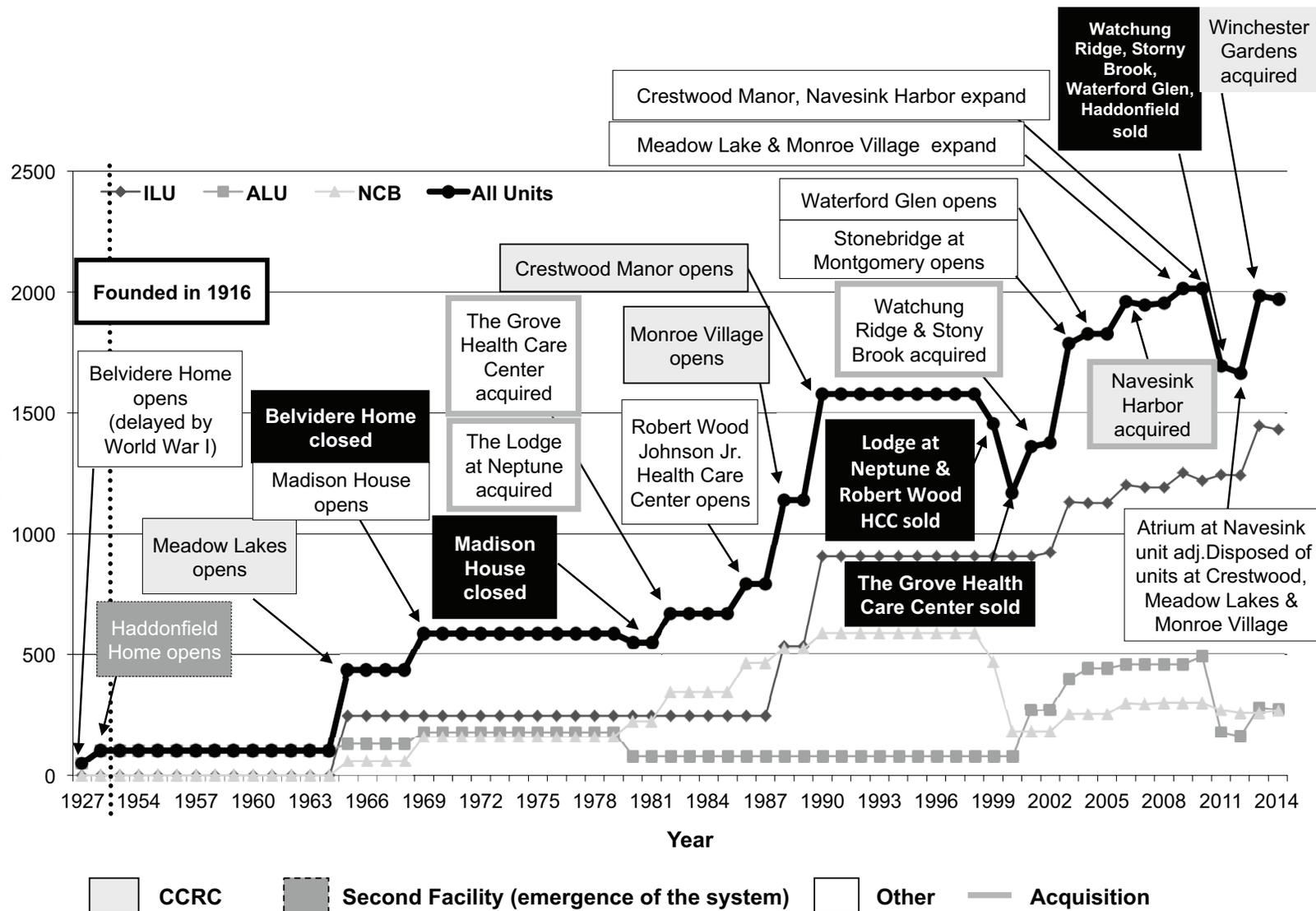
Text boxes point to opening date of first phase of communities



5-4 2015 LeadingAge Ziegler 150

Growth: Pace of Growth

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



5-5 2015 LeadingAge Ziegler 150

Growth: Aggregate Growth

5-5a ORGANIZATIONS BY AGGREGATE GROWTH, BY PERIOD

2015 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/14)
			Aggregate Growth (%)	Average Annual Growth (%)		
<i>Growth in 2014 (n=150)</i>						
118	Episcopal SeniorLife Communities	NY	84.99%	84.99%	317	690
120	St. Andrews Resources for Seniors	MO	83.38%	83.38%	311	684
51	Wesley Enhanced Living	PA	29.35%	29.35%	300	1,322
96	Heritage Ministries	NY	29.17%	29.17%	182	806
90	Christian Care Communities, Inc.	KY	28.48%	28.48%	186	839
13	Ecumen	MN	27.50%	27.50%	652	3,023
85	Eventide	MN	18.87%	18.87%	140	882
66	United Methodist Memorial Home	IN	17.34%	17.34%	164	1,110
30	National Church Residences	OH	14.79%	14.79%	239	1,855
127	Presbyterian Retirement Communities Northwest	WA	13.87%	13.87%	82	673
<i>Growth from 2000 to 2014 (n=150)</i>						
1	National Senior Campuses	MD	590.6%	17.47%	15,498	18,122
13	Ecumen	MN	356.6%	13.49%	2,361	3,023
30	National Church Residences	OH	320.6%	12.72%	1,414	1,855
57	SantaFe Senior Living	FL	317.29%	12.64%	936	1,231
42	Loretto	NY	290.21%	12.01%	1,097	1,475
9	Lutheran Senior Services	MO	221.32%	10.22%	2,346	3,406
32	Christian Care Companies	AZ	197.67%	9.52%	1,188	1,789
28	Concordia Lutheran Ministries	PA	188.60%	9.23%	1,224	1,873
77	United Church Homes & Services	NC	166.39%	8.51%	594	951
53	Lutheran Life Ministries	IL	158.33%	8.23%	779	1,271
<i>Growth from 1990 to 2014 (n=145)</i>						
95	Givens Estates Retirement Community	NC	779.3%	10.39%	717	809
42	Loretto	NY	757.6%	10.26%	1,303	1,475
4	Presbyterian Homes and Services	MN	742.6%	10.17%	6,052	6,867
72	Elant	NY	729.2%	10.09%	875	995
138	Smith Senior Living	IL	720.0%	10.04%	540	615
70	Lutheran Homes of South Carolina	SC	667.91%	9.71%	895	1,029
15	Pacific Retirement Services, Inc.	OR	518.38%	8.63%	2,369	2,826
32	Christian Care Companies	AZ	450.46%	8.06%	1,464	1,789
57	SantaFe Senior Living	FL	435.22%	7.92%	1,001	1,231
111	Mather LifeWays	IL	421.83%	7.80%	599	741

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

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

5-5 2015 LeadingAge Ziegler 150

Growth: Aggregate Growth

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

2015 Rank	System Name	State	Growth*		Total Units (as of 12/31/14)
			Units Added	Aggregate Growth (%)	
<i>Growth in 2014 (n=150)</i>					
13	Ecumen	MN	652	27.50%	3,023
1	National Senior Campuses	MD	440	2.49%	18,122
118	Episcopal SeniorLife Communities	NY	317	84.99%	690
120	St. Andrews Resources for Seniors	MO	311	83.38%	684
51	Wesley Enhanced Living	PA	300	29.35%	1,322
30	National Church Residences	OH	239	14.79%	1,855
96	Heritage Ministries	NY	182	29.17%	806
66	United Methodist Memorial Home	IN	164	17.34%	1,110
5	Covenant Retirement Communities	IL	162	3.44%	4,865
19	Diakon Lutheran Social Ministries	PA	146	6.46%	2,407
<i>Growth from 2000 to 2014 (n=150)</i>					
1	National Senior Campuses	MD	15,498	590.63%	18,122
2	Evangelical Lutheran Good Samaritan Society	SD	7,241	67.00%	18,048
4	Presbyterian Homes and Services	MN	4,186	156.14%	6,867
13	Ecumen	MN	2,361	356.65%	3,023
9	Lutheran Senior Services	MO	2,346	221.32%	3,406
3	ACTS Retirement-Life Communities, Inc.	PA	2,244	39.03%	7,993
8	The Kendal Corporation	PA	1,989	114.11%	3,732
29	Senior Quality Lifestyles Corporation	TX	1,858	n/a**	1,858
34	Homewood Retirement Centers	MD	1,694	n/a**	1,694
15	Pacific Retirement Services, Inc.	OR	1,529	117.89%	2,826
<i>Growth from 1990 to 2014 (n=145)</i>					
1	National Senior Campuses	MD	18,122	n/a**	18,122
2	Evangelical Lutheran Good Samaritan Society	SD	8,263	84.45%	18,048
4	Presbyterian Homes and Services	MN	6,052	742.58%	6,867
3	ACTS Retirement-Life Communities, Inc.	PA	3,062	62.10%	7,993
8	The Kendal Corporation	PA	2,979	395.62%	3,732
9	Lutheran Senior Services	MO	2,715	392.91%	3,406
15	Pacific Retirement Services, Inc.	OR	2,369	518.38%	2,826
13	Ecumen	MN	2,361	356.65%	3,023
10	Westminster Communities of Florida	FL	2,069	174.75%	3,253
17	Asbury Communities	MD	1,899	217.03%	2,774

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

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

5-5 2015 LeadingAge Ziegler 150

Growth: Aggregate Growth

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

2015 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/14)
			Aggregate Growth (%)	Average Annual Growth (%)		
<i>Growth in 2014 (n=24)</i>						
13	Ecumen	MN	27.50%	27.50%	652	3,023
19	Diakon Lutheran Social Ministries	PA	6.46%	6.46%	146	2,407
12	Cornerstone Affiliates	CA	4.63%	4.63%	137	3,097
5	Covenant Retirement Communities	IL	3.44%	3.44%	162	4,865
1	National Senior Campuses	MD	2.49%	2.49%	440	18,122
18	Presbyterian Manors of Mid-America	KS	1.68%	1.68%	40	2,415
17	Asbury Communities	MD	1.50%	1.50%	41	2,774
9	Lutheran Senior Services	MO	1.40%	1.40%	47	3,406
4	Presbyterian Homes and Services	MN	1.25%	1.25%	85	6,867
20	Masonic Villages	PA	0.81%	0.81%	19	2,366
<i>Growth from 2000 to 2014 (n=24)</i>						
1	National Senior Campuses	MD	590.63%	17.47%	15,498	18,122
13	Ecumen	MN	356.65%	13.49%	2,361	3,023
9	Lutheran Senior Services	MO	221.32%	10.22%	2,346	3,406
4	Presbyterian Homes and Services	MN	156.14%	8.15%	4,186	6,867
15	Pacific Retirement Services, Inc.	OR	117.89%	6.71%	1,529	2,826
8	The Kendal Corporation	PA	114.11%	6.55%	1,989	3,732
20	Masonic Villages	PA	70.09%	4.53%	975	2,366
17	Asbury Communities	MD	69.35%	4.49%	1,136	2,774
2	Evangelical Lutheran Good Samaritan Society	SD	67.00%	4.37%	7,241	18,048
23	Shell Point	FL	53.83%	3.65%	717	2,049
<i>Growth from 1990 to 2014 (n=24)</i>						
4	Presbyterian Homes and Services	MN	742.6%	10.2%	6,052	6,867
15	Pacific Retirement Services, Inc.	OR	518.38%	8.63%	2,369	2,826
8	The Kendal Corporation	PA	395.62%	7.55%	2,979	3,732
9	Lutheran Senior Services	MO	392.91%	7.52%	2,715	3,406
13	Ecumen	MN	356.65%	7.15%	2,361	3,023
17	Asbury Communities	MD	217.03%	5.38%	1,899	2,774
10	Westminster Communities of Florida	FL	174.75%	4.70%	2,069	3,253
11	Presbyterian Senior Living	PA	121.59%	3.68%	1,712	3,120
14	Ohio Presbyterian Retirement Services	OH	114.08%	3.52%	1,604	3,010
20	Masonic Villages	PA	97.00%	3.13%	1,165	2,366

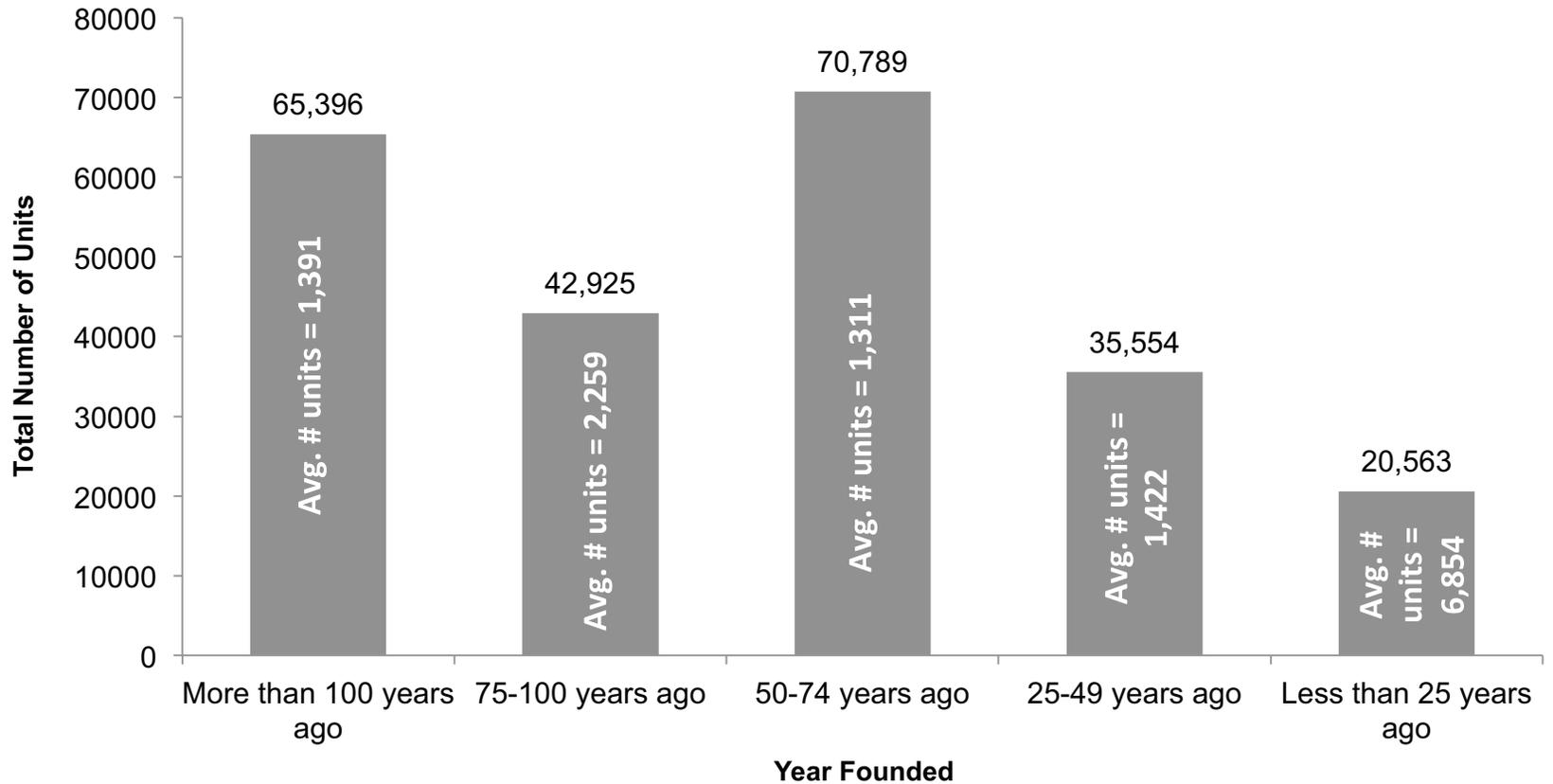
* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization. Average Annual Growth was calculated by finding the geometric mean over the period (1, 13, or 23 years).

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

5-6 2015 LeadingAge Ziegler 150

Growth: Size By Year Founded

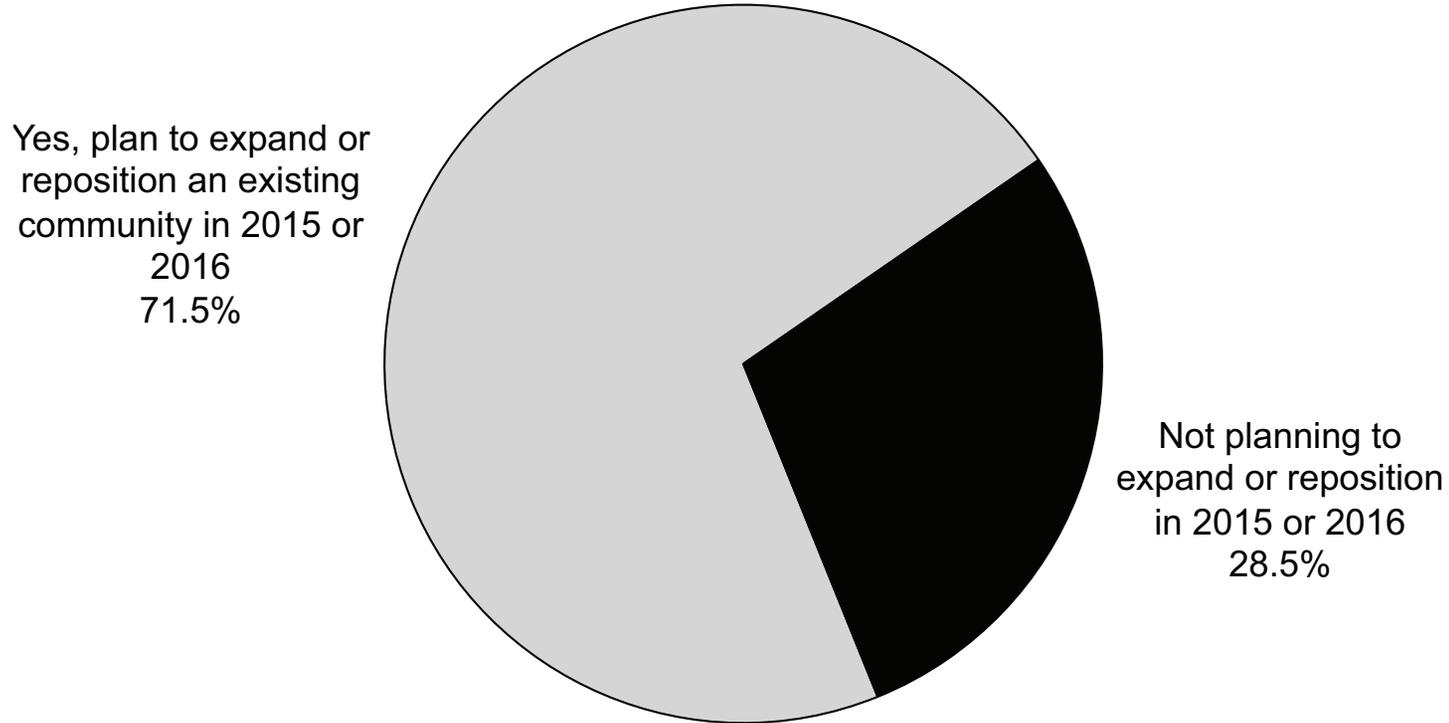
5-6 TOTAL UNITS BY YEAR FOUNDED AMONG LZ 150



5-7 2015 LeadingAge Ziegler 150

Growth: Future Growth Plans

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

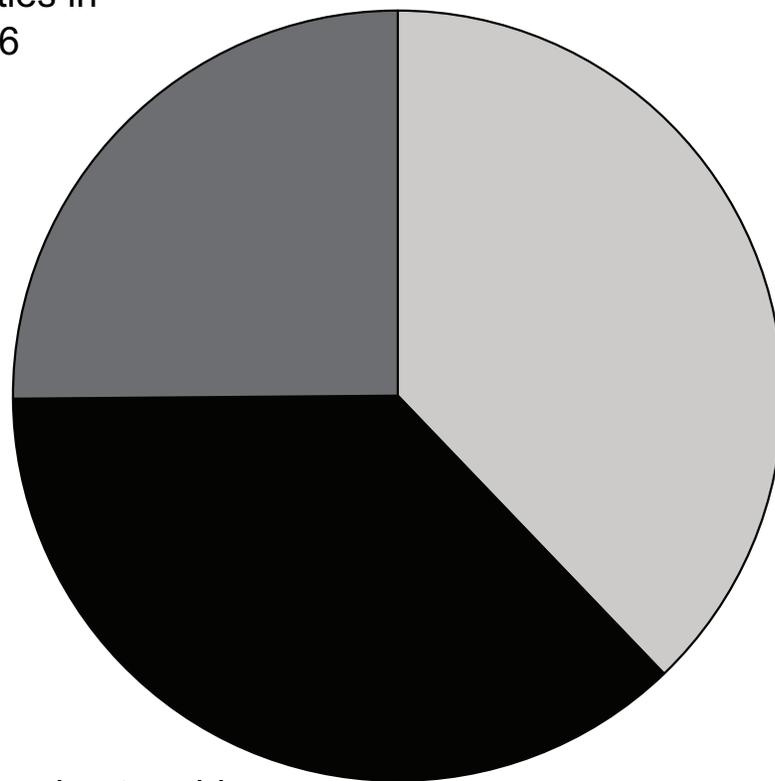


5-7 2015 LeadingAge Ziegler 150

Growth: Future Growth Plans

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

Responding "maybe" to new communities in 2015 or 2016
25%



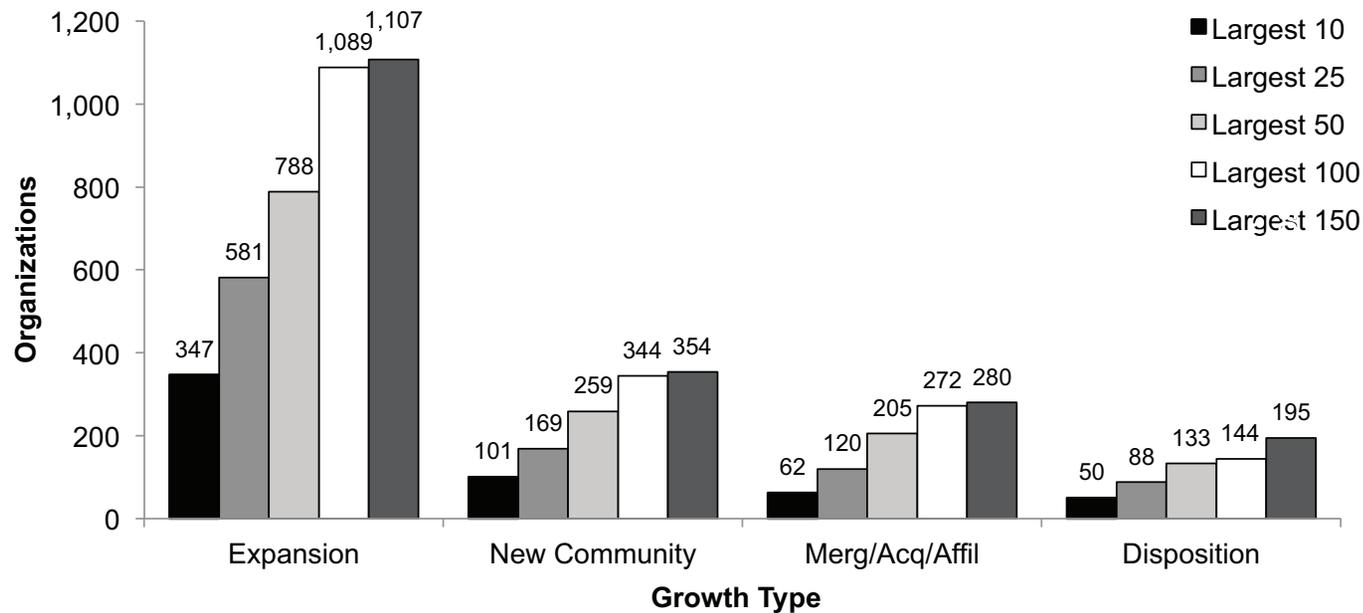
Yes, plan to add new communities in 2015 or 2016
38%

Not planning to add new communities in 2015 or 2016
37%

5-8 2015 LeadingAge Ziegler 150

Growth: Type of Growth by Organizations

5-8a NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1980 THROUGH 2014



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.

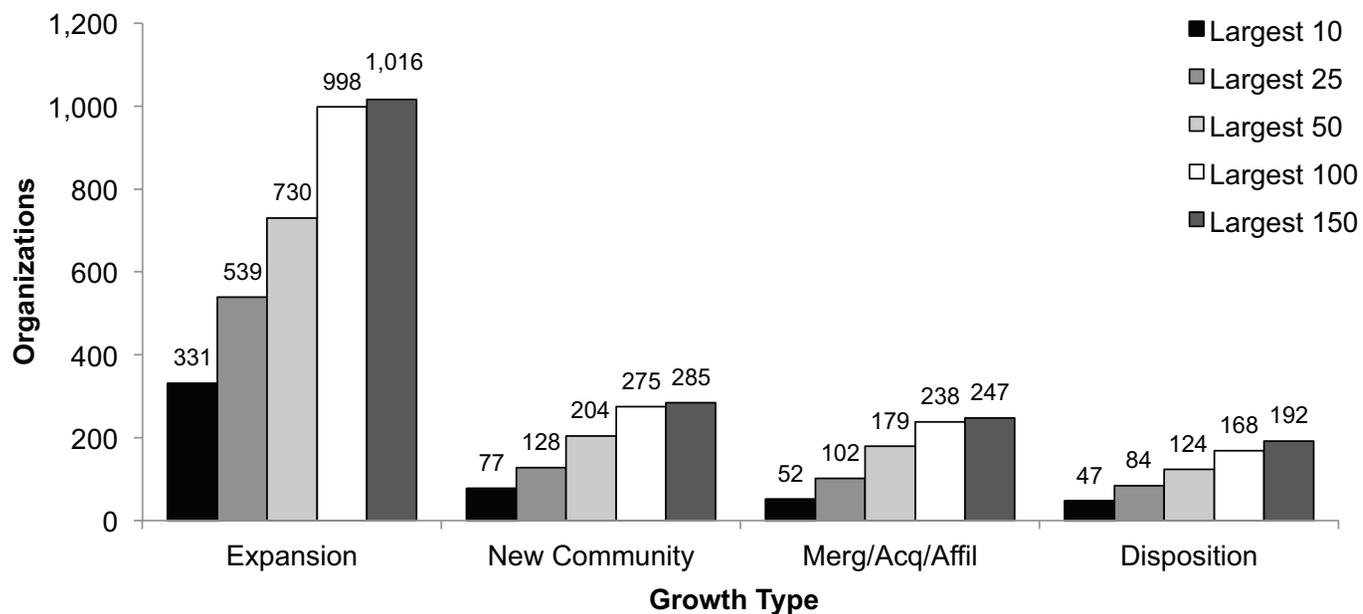
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-8 2015 LeadingAge Ziegler 150

Growth: Type of Growth by Organizations

5-8b NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1990 THROUGH 2014



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.

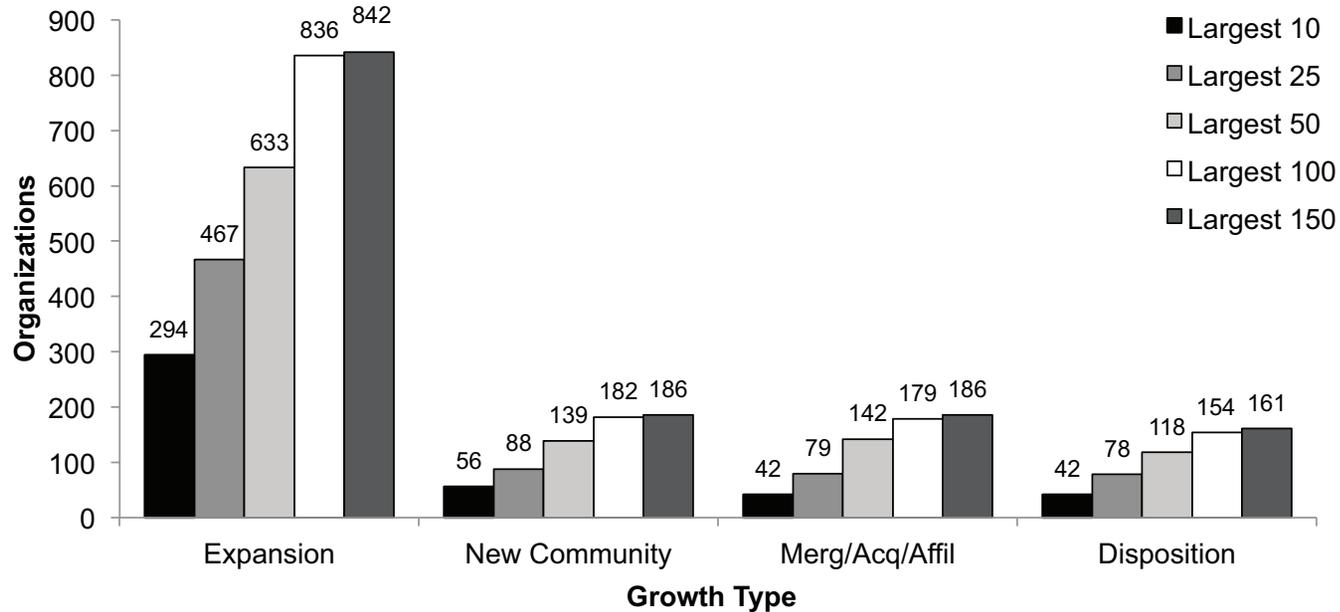
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-8 2015 LeadingAge Ziegler 150

Growth: Type of Growth by Organizations

5-8c NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 2000 THROUGH 2014



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

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

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

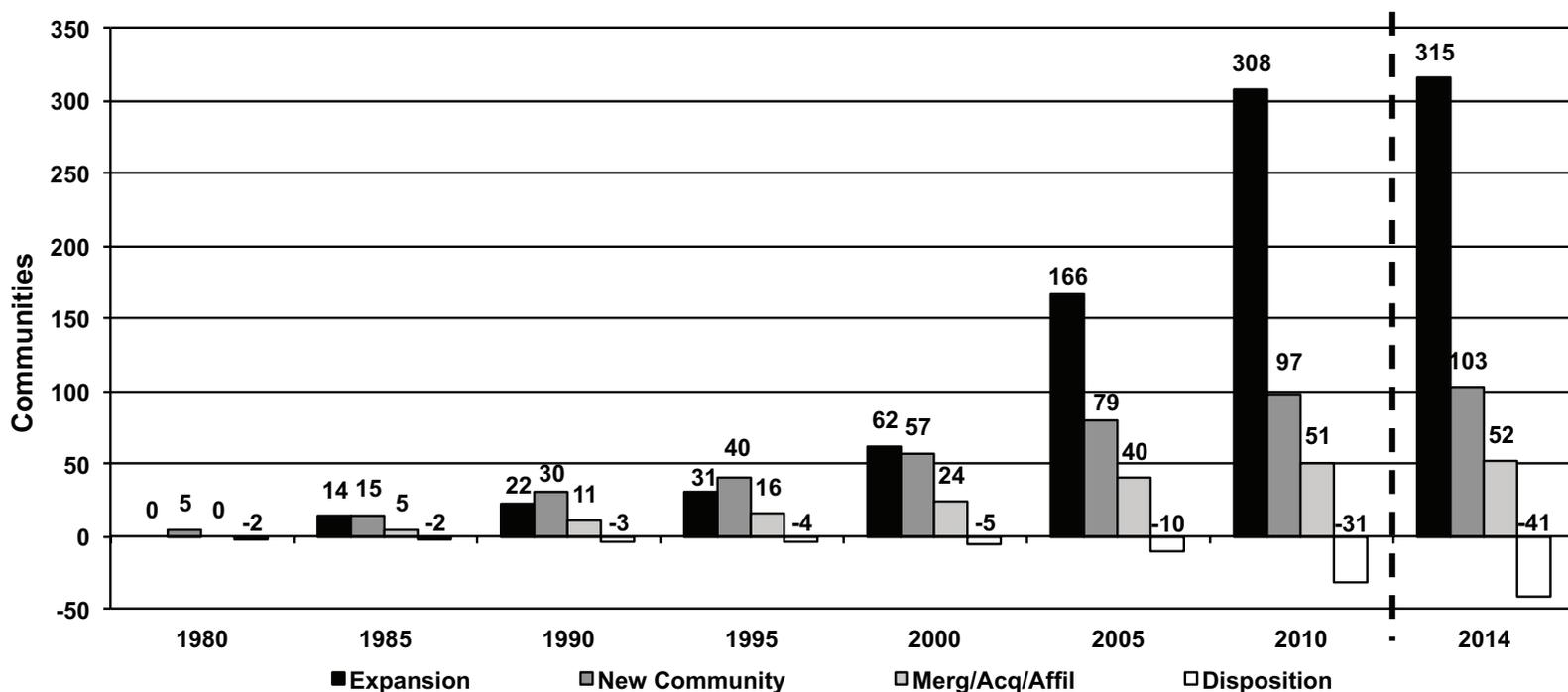
Disposition: The sale or closure of a community.

5-9 2015 LeadingAge Ziegler 150

Growth: Type of Growth by Communities

5-9a CUMULATIVE GROWTH OF LARGEST 10 SYSTEMS

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



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

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

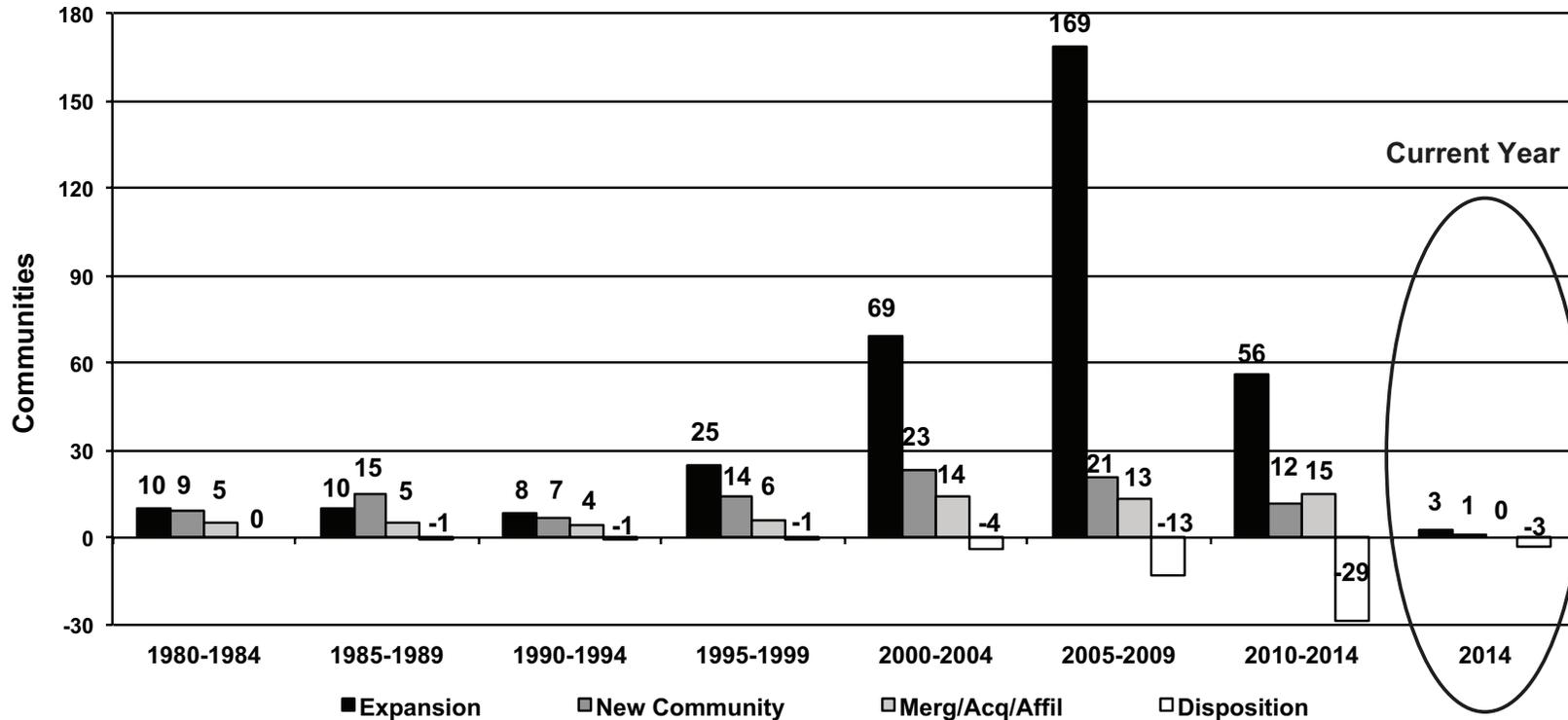
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-9 2015 LeadingAge Ziegler 150

Growth: Type of Growth by Communities

5-9b INCREMENTAL GROWTH OF LARGEST 10 SYSTEMS



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

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

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

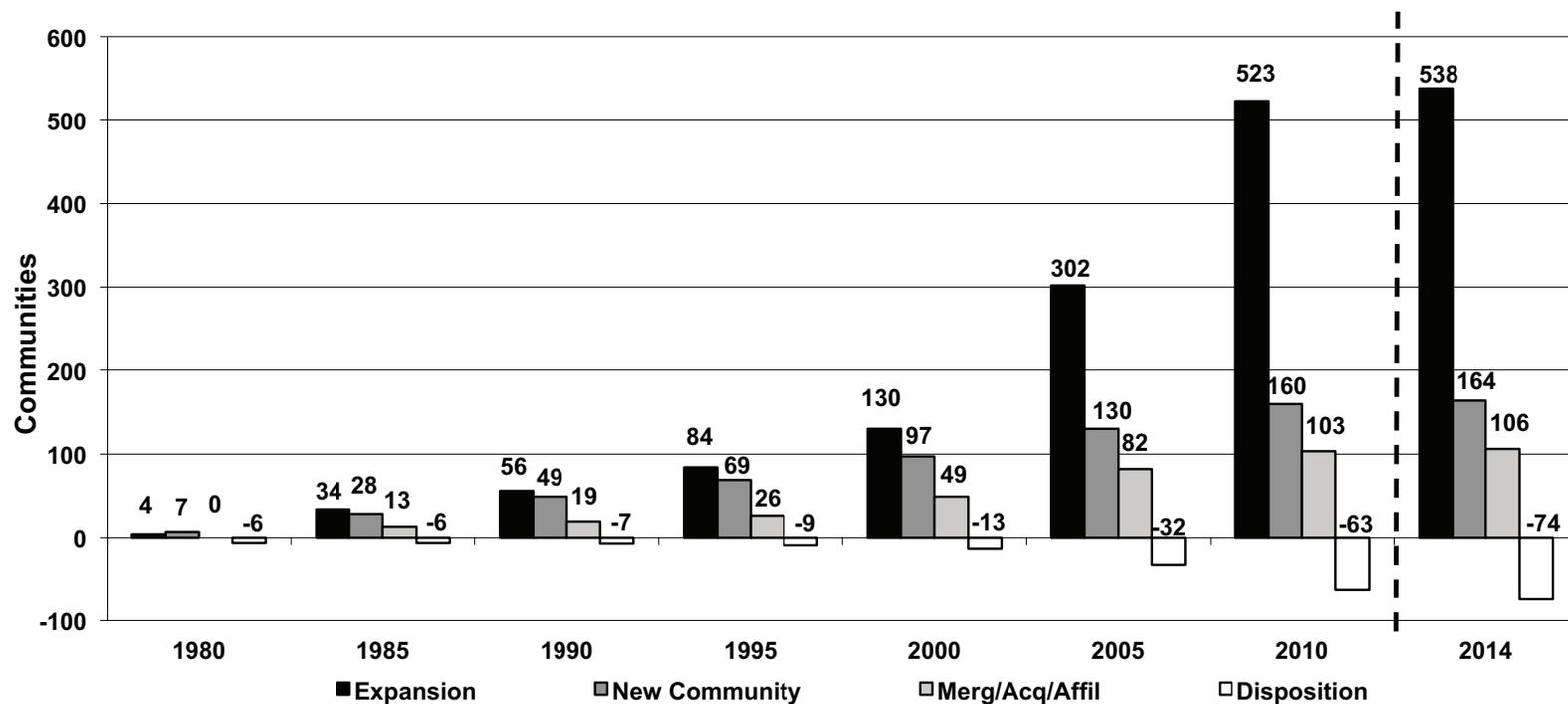
Disposition: The sale or closure of a community.

5-9 2015 LeadingAge Ziegler 150

Growth: Type of Growth by Communities

5-9c CUMULATIVE GROWTH OF LARGEST 25 SYSTEMS

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



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

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

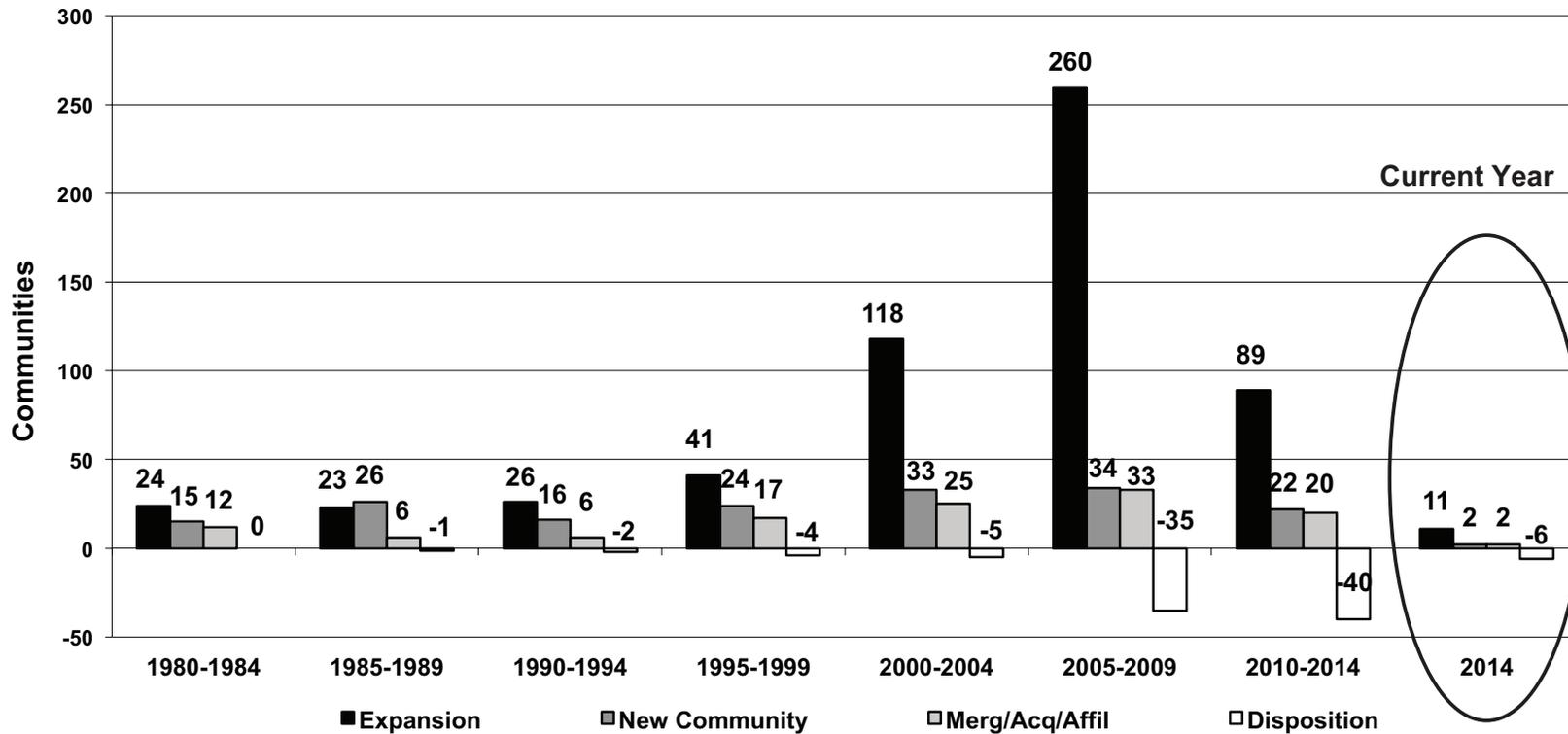
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-9 2015 LeadingAge Ziegler 150

Growth: Type of Growth by Communities

5-9d INCREMENTAL GROWTH OF LARGEST 25 SYSTEMS



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

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

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

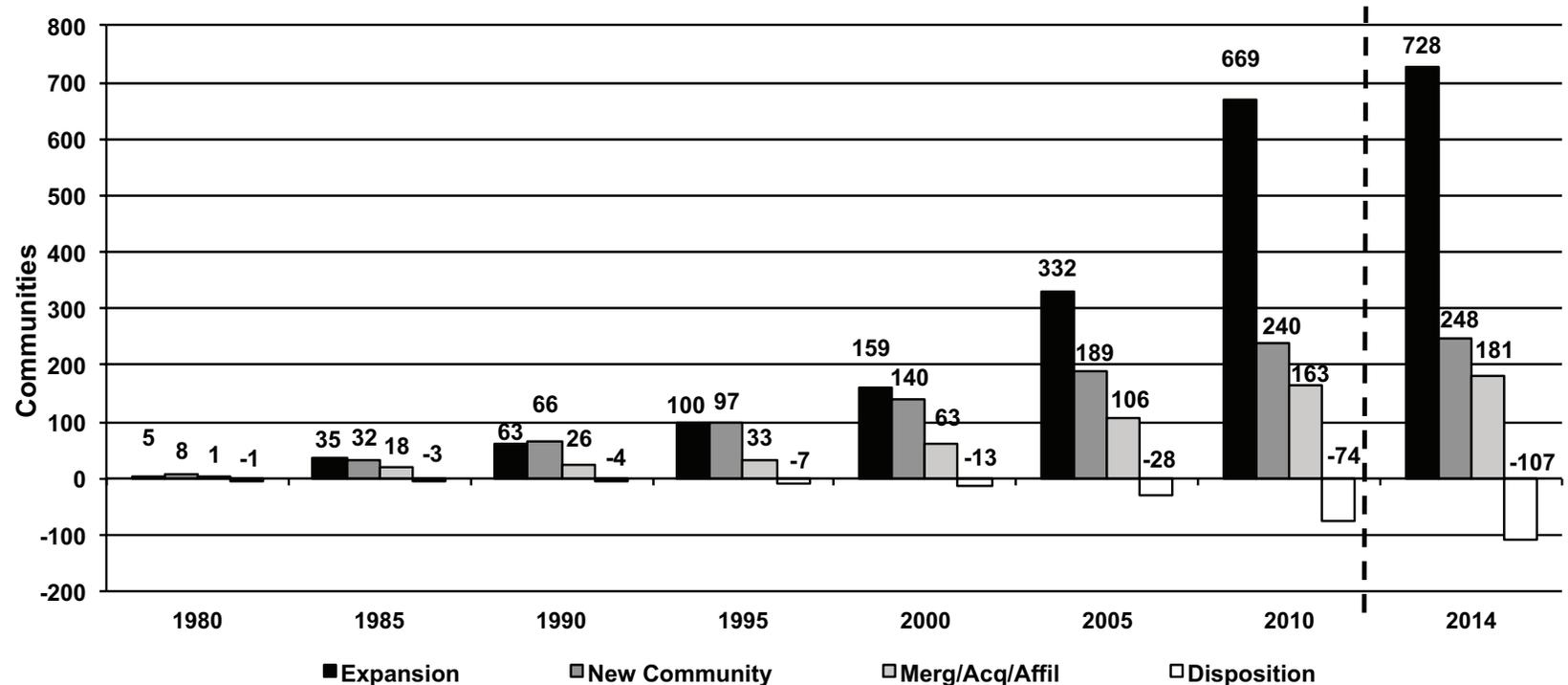
Disposition: The sale or closure of a community.

5-9 2015 LeadingAge Ziegler 150

Growth: Type of Growth by Communities

5-9e CUMULATIVE GROWTH OF LARGEST 50 SYSTEMS

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



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

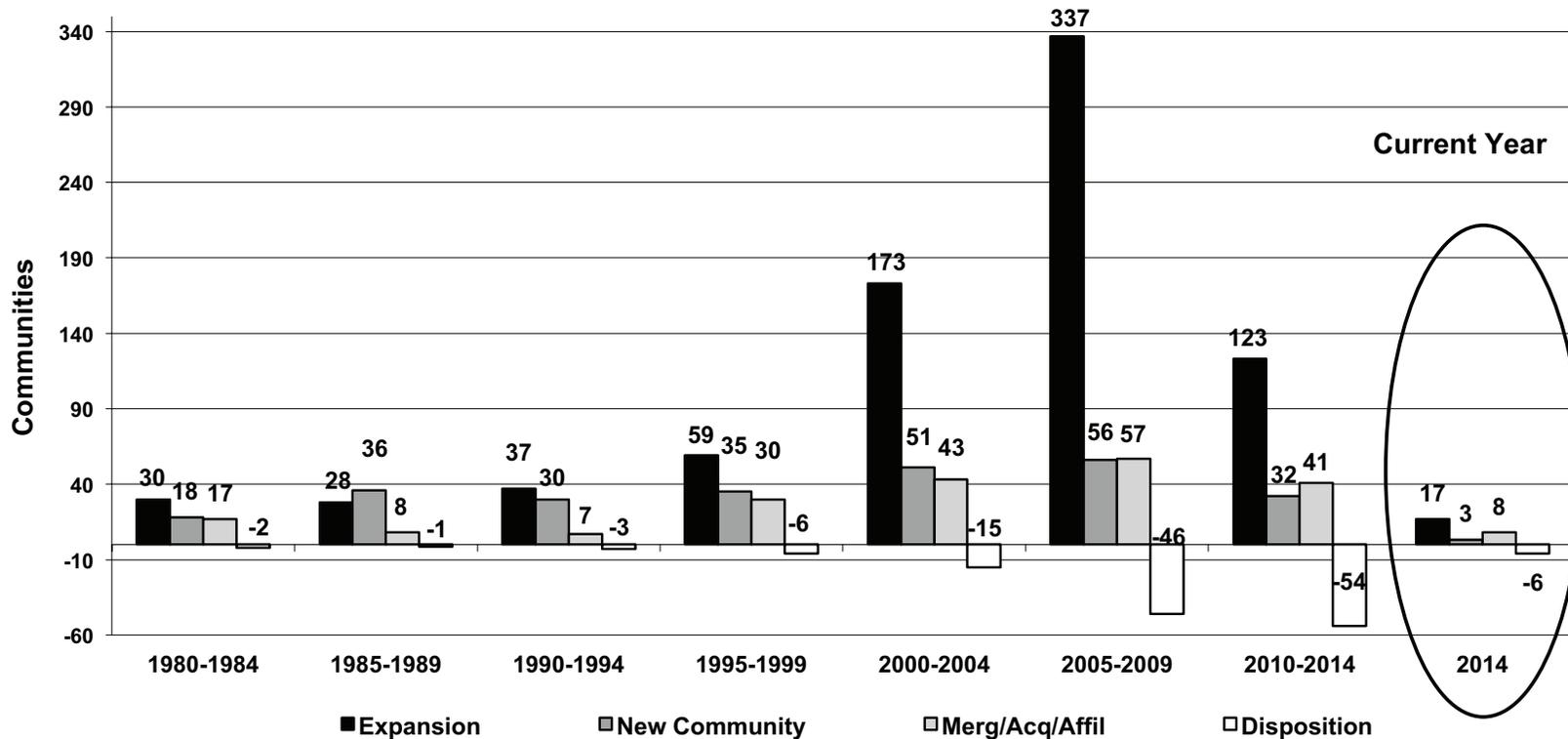
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

5-9 2015 LeadingAge Ziegler 150

Growth: Type of Growth by Communities 5-9f INCREMENTAL GROWTH OF LARGEST 50 SYSTEMS



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

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

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

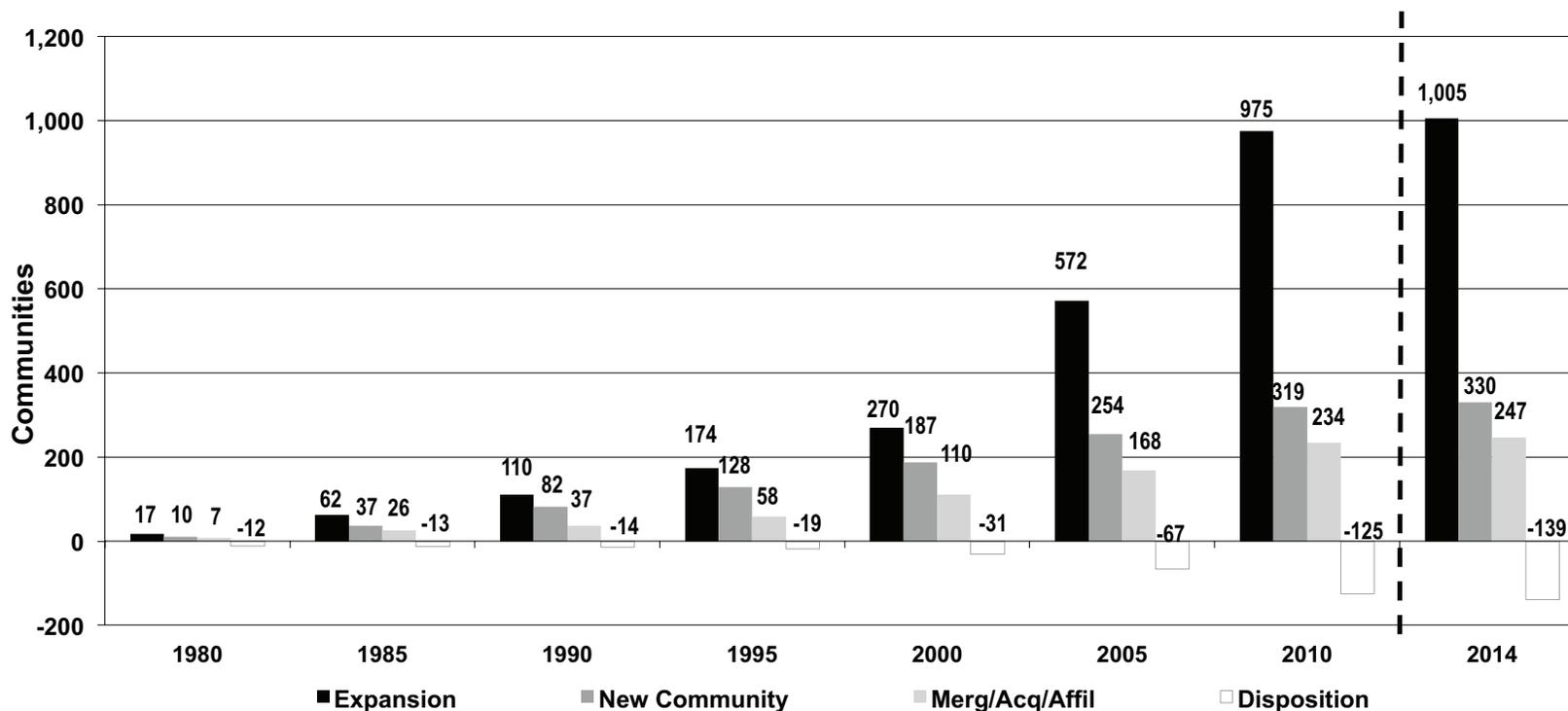
Disposition: The sale or closure of a community.

5-9 2015 LeadingAge Ziegler 150

Growth: Type of Growth by Communities

5-9g CUMULATIVE GROWTH OF LARGEST 100 SYSTEMS

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



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

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

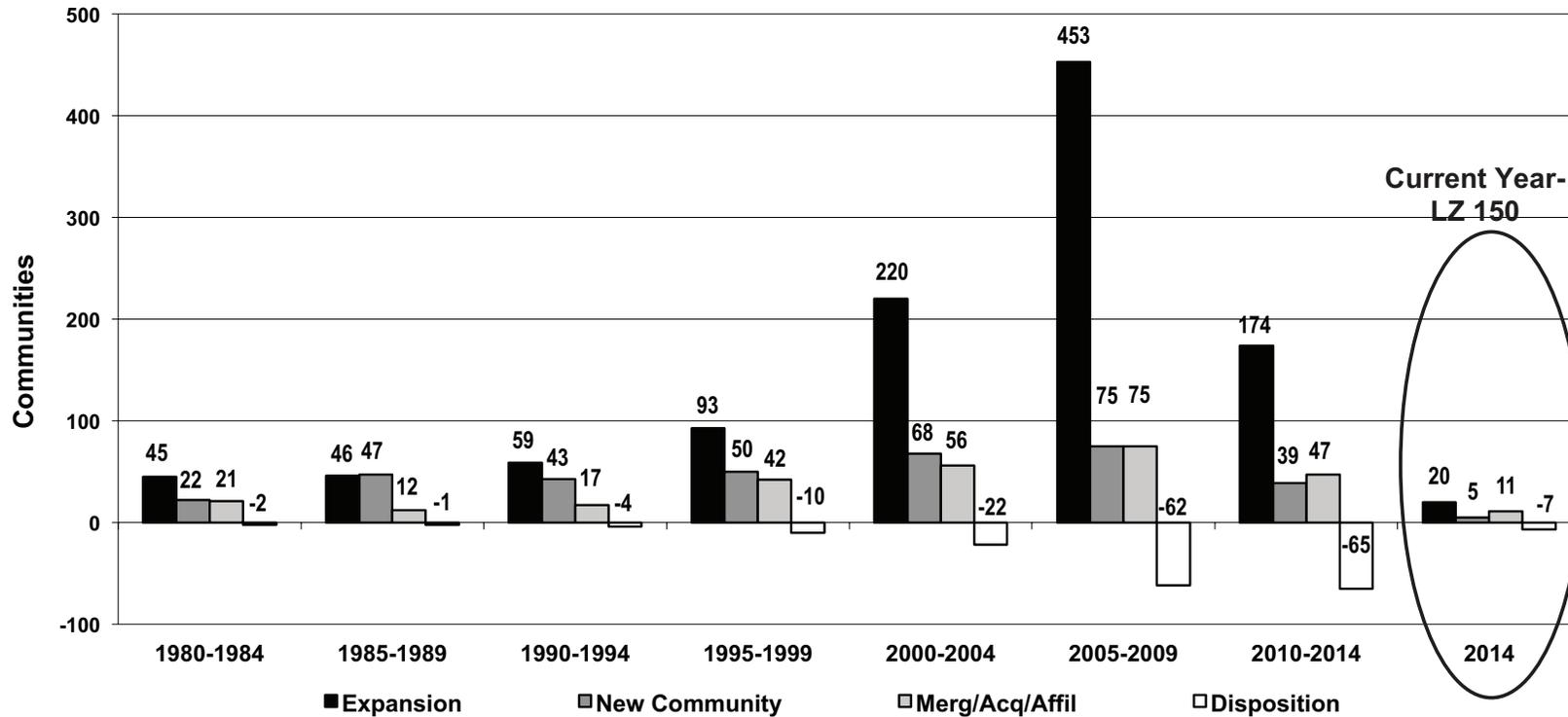
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

5-9 2015 LeadingAge Ziegler 150

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



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

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

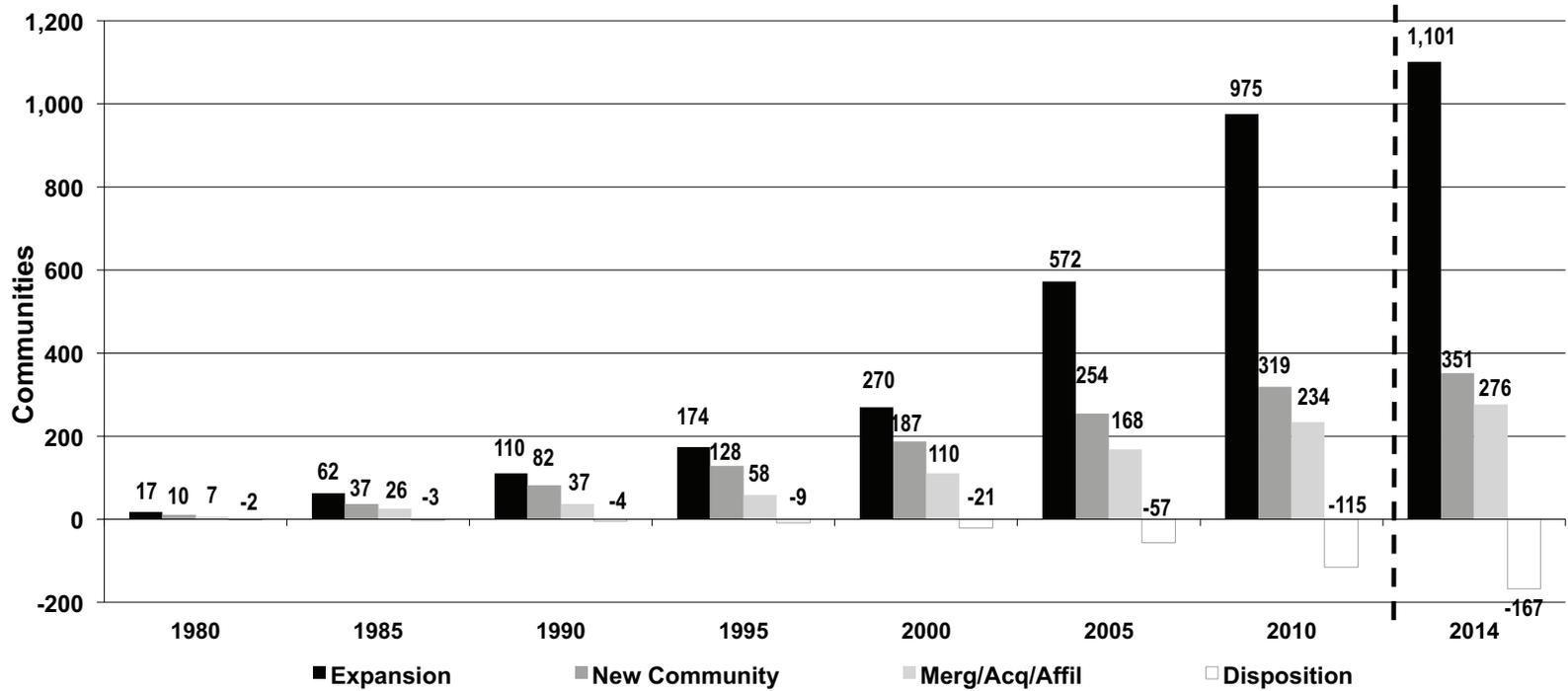
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-9 2015 LeadingAge Ziegler 150

Growth: Type of Growth of Communities

5-9i CUMULATIVE 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.

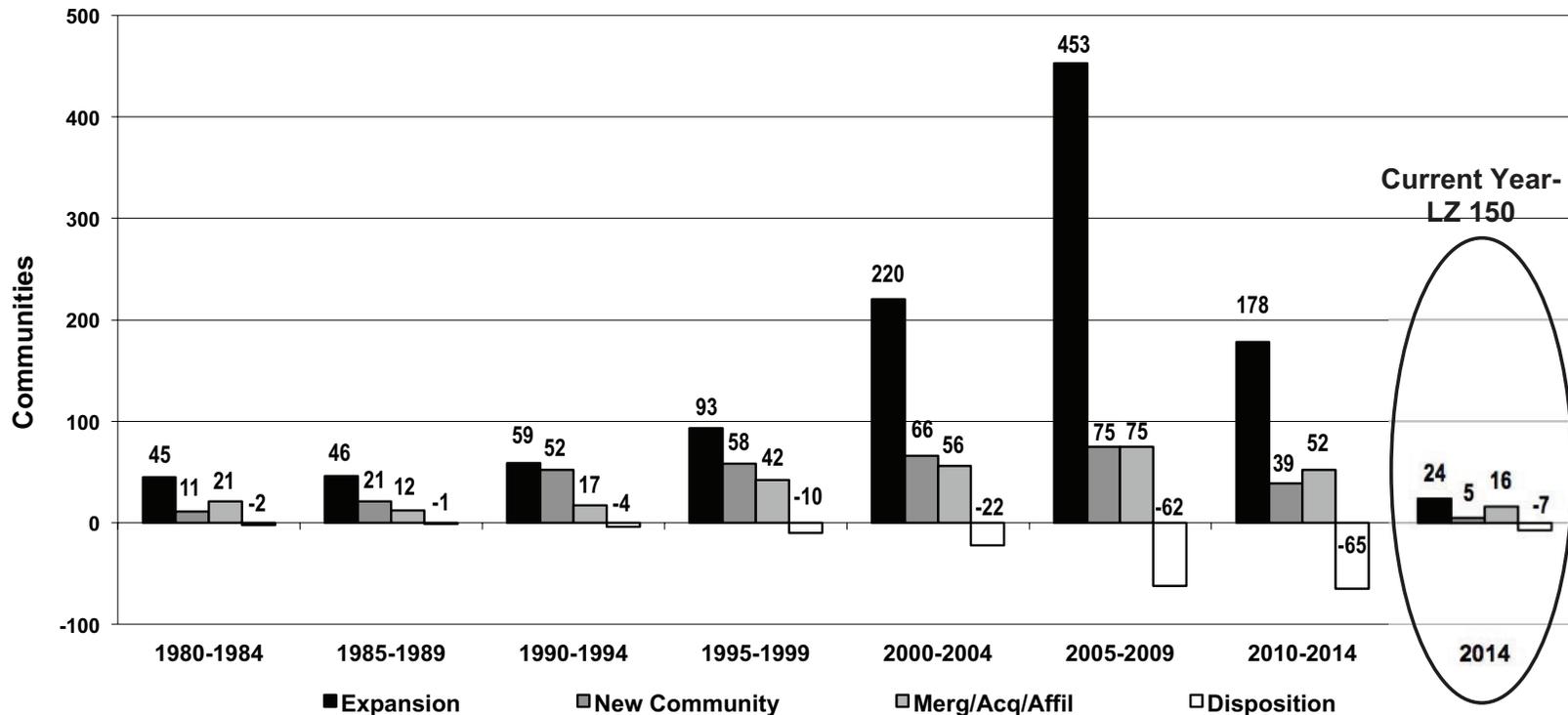
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-9 2015 LeadingAge Ziegler 150

Growth: Type of Growth of Communities

5-9j 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.

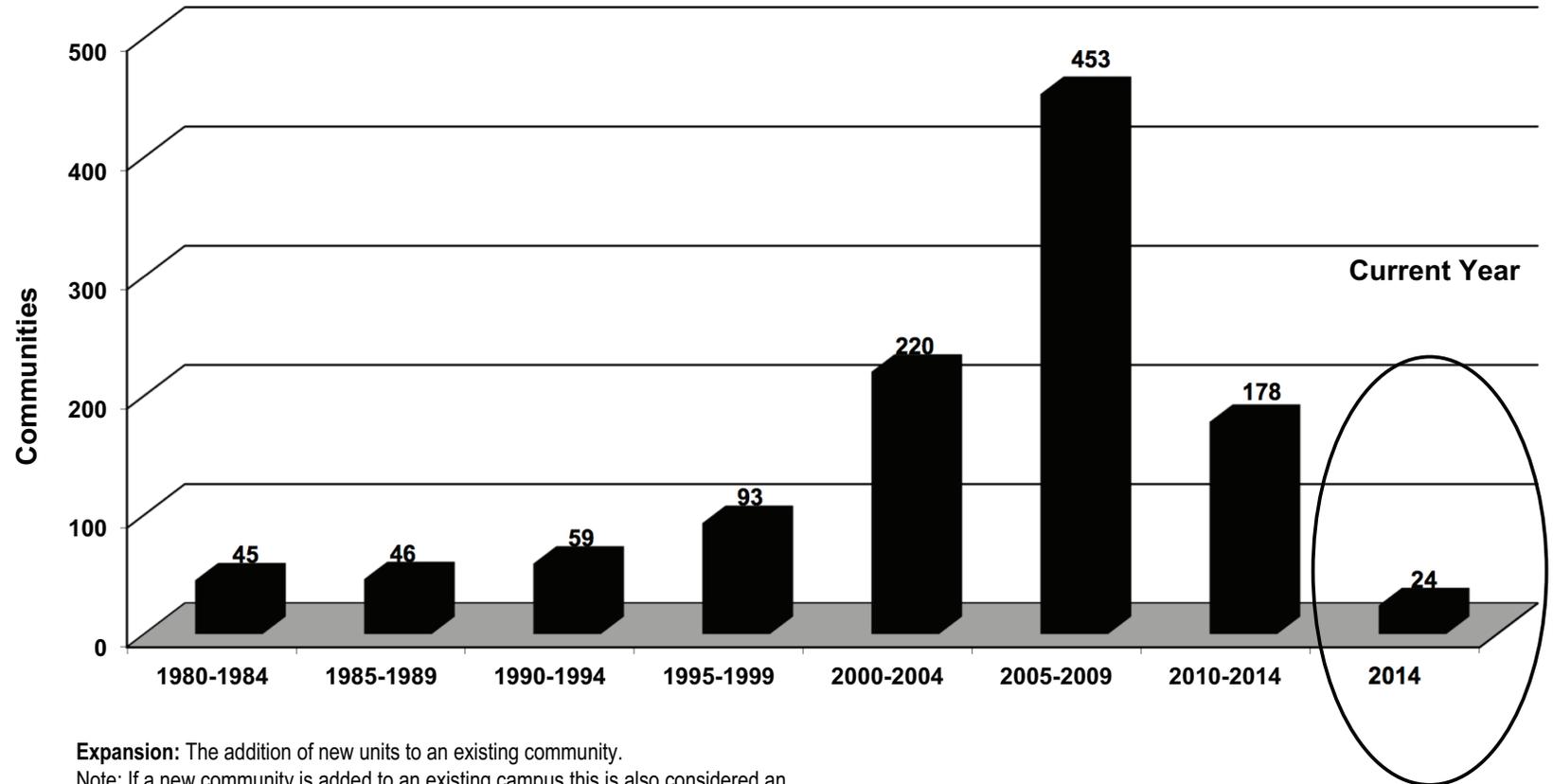
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

5-10 2015 LeadingAge Ziegler 150

Growth: Expansions

5-10a HISTORICAL GROWTH



Expansion: The addition of new units to an existing community.
 Note: If a new community is added to an existing campus this is also considered an expansion. *Reflects increase to largest 150 with 2014 publication

5-10 2015 LeadingAge Ziegler 150

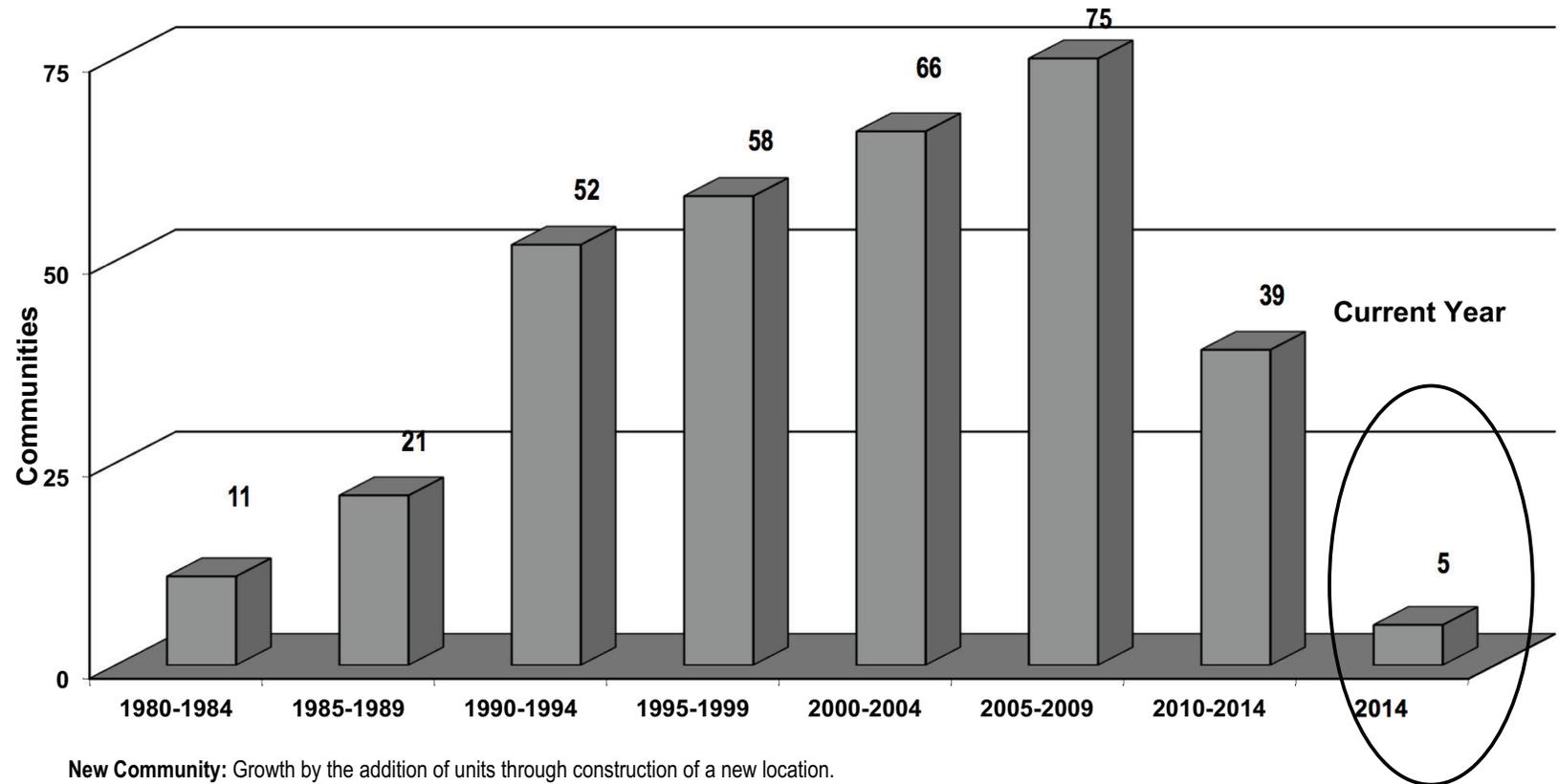
Growth: Expansions

5-10b 2014 COMMUNITY EXPANSIONS

2015 Rank	System Name	Community	City	State	Community Type
1	National Senior Campuses	Windcrest	Highlands Ranch	CO	CCRC
1	National Senior Campuses	Tall Grass Creek	Overland Park	KS	CCRC
1	National Senior Campuses	Ashby Ponds	Loudon	VA	CCRC
5	Covenant Retirement Communities	Covenant Village of Northbrook	Northbrook	IL	CCRC
9	Lutheran Senior Services	Breeze Park	St. Charles	MO	CCRC
11	Presbyterian Senior Living	Ware Presbyterian Village	Oxford	PA	CCRC
12	Cornerstone Affiliates	Valle Verde	Santa Barbara	CA	CCRC
12	Cornerstone Affiliates	Terraces at Los Altos	Los Altos	CA	CCRC
14	Ohio Presbyterian Retirement Services	Cape May	Wilmington	OH	CCRC
15	Pacific Retirement Services	Holladay Park Plaza	Portland	OR	CCRC
20	Masonic Villages of the Grand Lodge of Pennsylvania	Masonic Village at Elizabethtown	Elizabethtown	PA	CCRC
23	Shell Point	Alliance Community for Retirement Living	Deland	FL	CCRC
24	Willow Valley Communities	Willow Valley Communities	Lancaster	PA	CCRC
26	Franciscan Communities, Inc.	Franciscan Village	Lemont	IL	CCRC
30	National Church Residences	Legacy Village	Xenia	OH	CCRC
33	Elim Care	Netwon Village	Newton	IA	CCRC
35	Providence Life Services	Victorian Village	Homer Glen	IL	SNF
40	Episcopal Senior Communities	Spring Lake Village	Santa Rosa	CA	CCRC
59	Phoebe Ministries	Phoebe Richland	Richland	PA	CCRC
98	BHI Senior Living, Inc.	Hoosier Village	Indianapolis	IN	CCRC
103	Lutheran Social Services of Michigan	Maple Creek Cottages	Grand Rapids	MI	ILF
109	Sun Health Senior Living, LLC.	Sun Health Colonnade	Surprise	AZ	CCRC
112	Landis Communities	Landis Homes	Lititz	PA	CCRC
136	Porter Hills	Porter Hills Village	Grand Rapids	MI	CCRC

5-11 2015 LeadingAge Ziegler 150

Growth: New Communities
5-11a HISTORICAL GROWTH



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

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

5-11 2015 LeadingAge Ziegler 150

Growth: New Communities

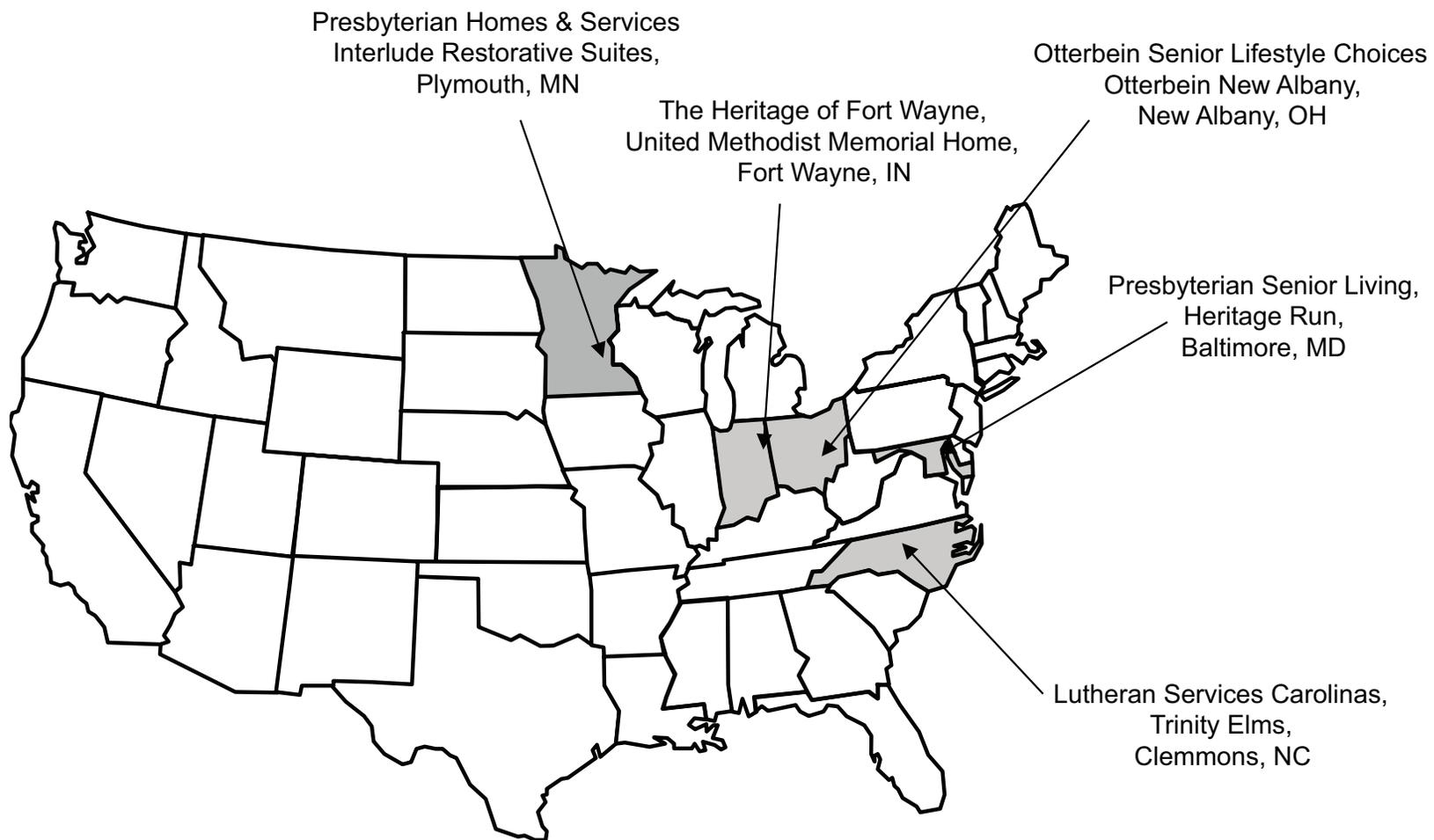
5-11b 2014 COMMUNITY OPENINGS

2015 Rank	System Name	Community	City	State	Community Type
4	Presbyterian Homes & Services	Interlude Restorative Suites	Plymouth	MN	SNF
11	Presbyterian Senior Living	Heritage Run	Baltimore	MD	ILF
31	Otterbein Senior Lifestyle Choices	Otterbein New Albany	New Albany	OH	SNF
55	Lutheran Services Carolinas	Trinity Elms	Clemmons	NC	SNF
66	United Methodist Memorial Home	Heritage of Fort Wayne	Fort Wayne	IN	CCRC

5-11 2015 LeadingAge Ziegler 150

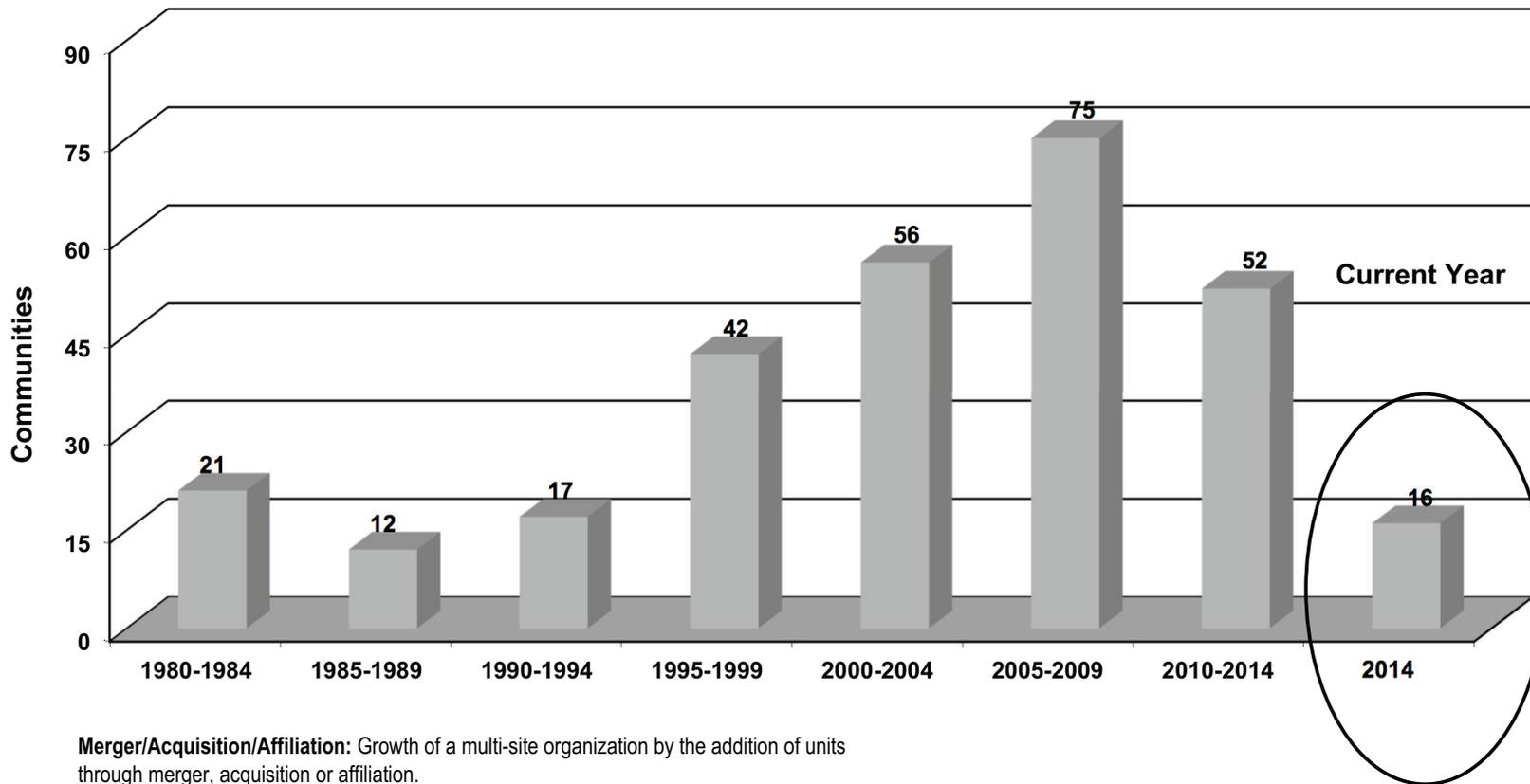
Growth: New Communities

5-11c 2014 LOCATIONS



5-12 2015 LeadingAge Ziegler 150

Growth: Mergers/Acquisitions/Affiliations 5-12a HISTORICAL GROWTH



LeadingAge 150 Ziegler

5-12 2015 LeadingAge Ziegler 150

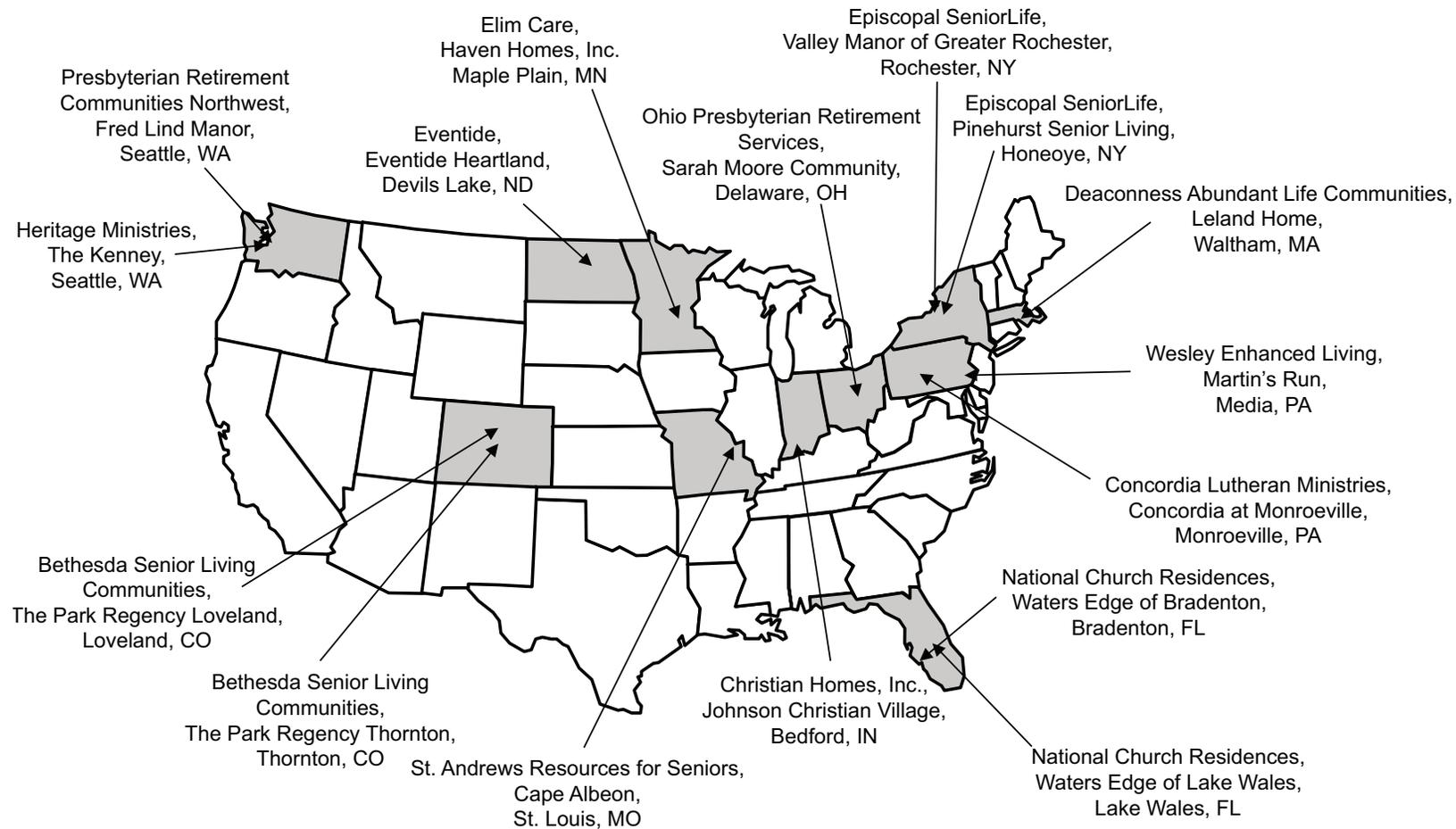
Growth: Mergers/Acquisitions/Affiliations

5-12b 2014 MERGERS/ACQUISITIONS/AFFILIATIONS

2015 Rank	System Name	Community	City	State	Community Type
14	Ohio Presbyterian Retirement Services	Sarah Moore Community	Delaware	OH	ALF
22	Christian Homes, Inc.	Johnson Christian Village	Bedford	IN	ALF
28	Concordia Lutheran Ministries	Concordia of Monroeville	Monroeville	PA	ALF
30	National Church Residences	Waters Edge of Bradenton	Bradenton	FL	ILF
30	National Church Residences	Waters Edge of Lake Wales	Lake Wales	FL	ILF
33	Elim Care	Haven Homes, Inc.	Maple Plain	MN	SNF
43	Bethesda Senior Living Communities	The Park Regency Loveland	Loveland	CO	ALF
43	Bethesda Senior Living Communities	The Park Regency Thornton	Thornton	CO	ALF
51	Wesley Enhanced Living	Martin's Run	Media	PA	CCRC
85	Eventide	Eventide Heartland	Devils Lake	ND	SNF
96	Heritage Ministries	The Kenney	Seattle	WA	CCRC
118	Episcopal SeniorLife	Valley Manor of Greater Rochester	Rochester	NY	ILF
118	Episcopal SeniorLife	Pinehurst Senior Living	Honeoye Falls	NY	ILF
120	St. Andrews Resources for Seniors	Cape Albeon	St. Louis	MO	CCRC
127	Presbyterian Retirement Communities Northwest	Fred Lind Manor	Seattle	WA	ILF
135	Deaconness Abundant Life Communities	Leland Home	Waltham	MA	ALF

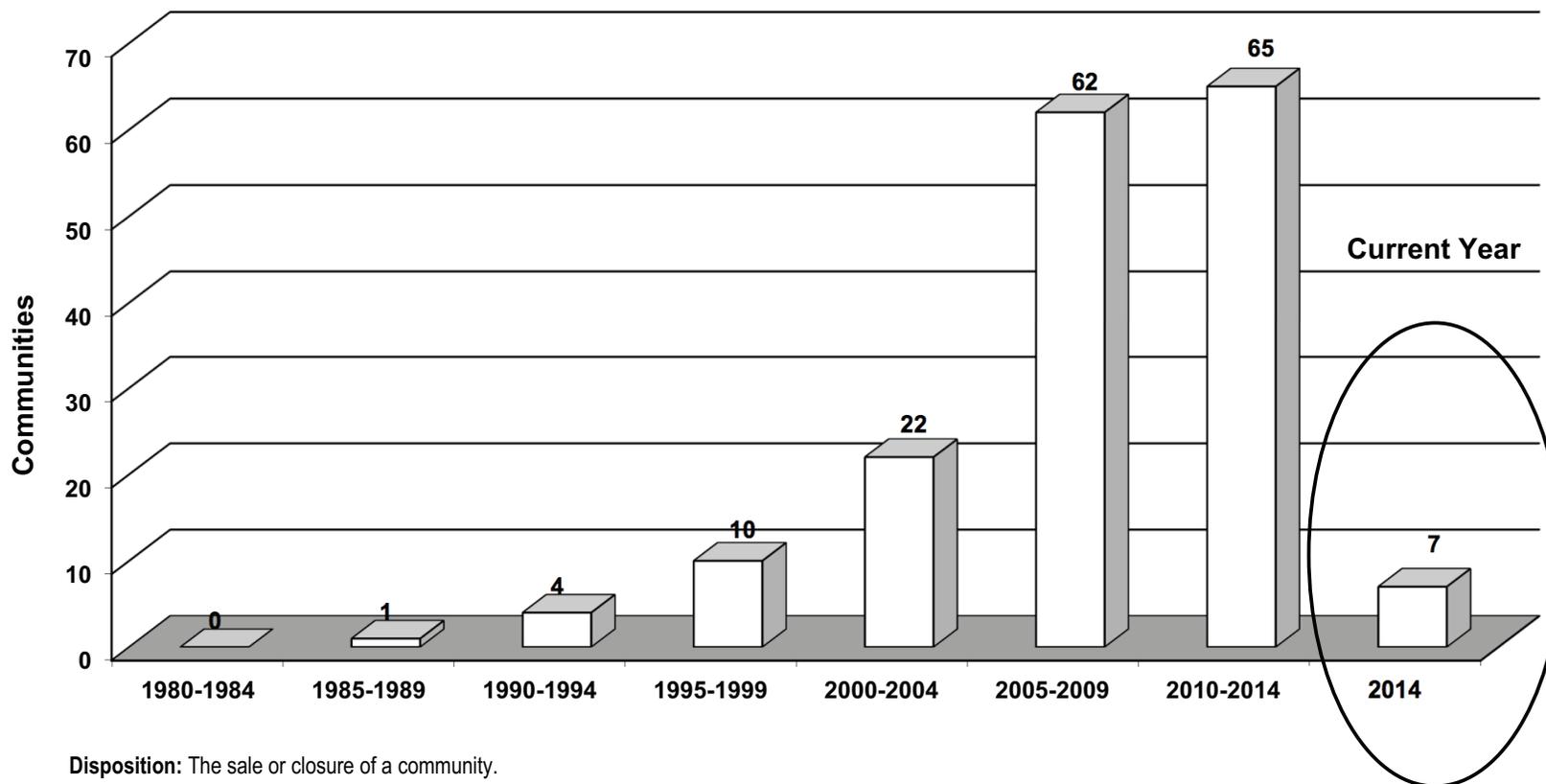
5-12 2015 LeadingAge Ziegler 150

Growth: Mergers/Acquisitions/Affiliations 5-12c 2014 LOCATIONS



5-13 2015 LeadingAge Ziegler 150

Growth: Dispositions
5-13a HISTORICAL GROWTH



Disposition: The sale or closure of a community.

*Reflects increase to largest 150 with the 2014 publication.

5-13 2015 LeadingAge Ziegler 150

Growth: Dispositions

5-13b 2014 COMMUNITY CLOSURES OR DISPOSITIONS

2015 Rank	System Name	Community	City	State	Community Type
2	Evangelical Lutheran Good Samaritan Society	Lakeview Good Samaritan Center	Glenwood	MN	SNF
2	Evangelical Lutheran Good Samaritan Society	Majestic Rim	Payson	AZ	ILF
2	Evangelical Lutheran Good Samaritan Society	Winfield Good Samaritan Village	Winfield	KS	ALF
11	Mather Lifeways	Mather Pavilion	Evanston	IL	SNF
11	Presbyterian Senior Living	Sycamore Manor	Williamsport	PA	SNF
22	Christian Homes, Inc.	Bridgeway Christian Village	Bensenville	IL	CCRC
56	Presbyterian Villages of Michigan	The Village of Redford	Redford	MI	CCRC

5-13 2015 LeadingAge Ziegler 150

Growth: Dispositions
5-13c 2014 LOCATIONS



ELGSS: Evangelical Lutheran Good Samaritan Society

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 includes 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 are not part of a system, but are single-site organizations. These organizations may offer additional services, such as home-based care in the greater community, but oversee only one facility-based operation. The vast majority of these organizations are CCRCs.

Chart 6-1b shows that 82% of these organizations offer some type of home-based care, whether to their own residents or to individuals in the greater community. Figure 6-1c reveals that the majority of these organizations have adopted Electronic Medical/Health Records (EMR/EHR) and Electronic Point of Care/Point of Service (POC/POS) Documentation Systems.

Largest Individual Campuses

Returning to the 2015 publication 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 2,250 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 a number of organizations that are not on the LZ 150 multi-site senior living organization listing (Chart 6-2).

Systems by Total Market-Rate and Affordable Units

Chart 6-3 presents an aggregate ranking of unit types, market rate and affordable. This type of ranking better reflects the size and scope of each organization that provides residential options for seniors of varying income levels. For example, National Church Residences is ranked as LZ 150 #30 (**Primary Ranking**) with 1,855 total market-rate units; the organization is ranked #1 among this year's listing of affordable housing providers with 21,818 total affordable housing units (Chart 6-2), an increase of roughly 3,000 affordable units in the past year. By aggregating these two categories of seniors housing, the organization is the largest among the LZ 150 with 23,673 total units.

6-1 2015 LeadingAge Ziegler 150

Additional Listings: Single-Campus Senior Living Communities

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

2015 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/14)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
1	Charlestown Community, Inc	Catonsville	MD	1,815	1,484	125	206	81.8%	6.9%	11.3%
2	John Knox Village	Lee's Summit	MO	1,622	1,078	158	386	66.5%	9.7%	23.8%
3	Charles E. Smith Life Communities	Rockville	MD	1,134	500	78	556	44.1%	6.9%	49.0%
4	Henry Ford Village	Dearborn	MI	1,041	856	96	89	82.2%	9.2%	8.5%
5	Hebrew Home at Riverdale	Bronx	NY	1,004	134	0	870	13.3%	0.0%	86.7%
6	Panorama City	Lacey	WA	991	791	45	155	79.8%	4.5%	15.6%
7	John Knox Village of Florida, Inc.	Pompano Beach	FL	970	729	64	177	75.2%	6.6%	18.2%
8	Westminster Canterbury Richmond	Richmond	VA	837	510	169	158	60.9%	20.2%	18.9%
9	St. John's Homes & Meadows	Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
10	Cross Keys Village - The Brethren Home Community	New Oxford	PA	812	451	91	270	55.5%	11.2%	33.3%
11	Friendship Village Tempe	Tempe	AZ	794	575	91	128	72.4%	11.5%	16.1%
12	Menorah Park Center for Senior Living	Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
13	Brethren Village	Lititz	PA	758	497	141	120	65.6%	18.6%	15.8%
14	Lakeview Village, Inc.	Lenexa	KS	753	555	26	172	73.7%	3.5%	22.8%
15	Mennonite Home Communities	Lancaster	PA	753	415	150	188	55.1%	19.9%	25.0%
16	Glencroft Retirement Community	Glendale	AZ	715	391	99	225	54.7%	13.8%	31.5%
17	Atlantic Shores Cooperative Association	Virginia Beach	VA	671	555	66	50	82.7%	9.8%	7.5%
18	Miami Jewish Health Systems	Miami	FL	656	102	92	462	15.5%	14.0%	70.4%
19	Beatitudes Campus	Phoenix	AZ	652	459	121	72	70.4%	18.6%	11.0%
20	Copeland Oaks	Sebring	OH	638	341	107	190	53.4%	16.8%	29.8%
21	Westminster Canterbury on Chesapeake Bay	Virginia Beach	VA	629	439	95	95	69.8%	15.1%	15.1%
22	Carolina Meadows, Inc.	Chapel Hill	NC	616	447	79	90	72.6%	12.8%	14.6%
23	La Posada at Park Centre, Inc.	Green Valley	AZ	608	463	145	0	76.2%	23.8%	0.0%
24	Air Force Village West	Riverside	CA	591	440	92	59	74.5%	15.6%	10.0%
25	Springmoor Life Care Retirement Community	Raleigh	NC	589	398	18	173	67.6%	3.1%	29.4%

6-1 2015 LeadingAge Ziegler 150

Additional Listings: Single-Campus Senior Living Communities

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

2015 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/14)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	St. Joseph's John Knox Village	Tampa	FL	589	265	161	163	45.0%	27.3%	27.7%
27	The Army Residence Community	San Antonio	TX	584	445	48	91	76.2%	8.2%	15.6%
28	Twin Lakes Community	Burlington	NC	572	400	52	120	69.9%	9.1%	21.0%
29	The Philadelphia Protestant Home	Philadelphia	PA	567	266	175	126	46.9%	30.9%	22.2%
30	Franklin United Methodist Community	Franklin	IN	563	194	161	208	34.5%	28.6%	36.9%
31	Moorings Park	Naples	FL	563	384	73	106	68.2%	13.0%	18.8%
32	Pine Run Retirement Community	Doylestown	PA	561	288	146	127	51.3%	26.0%	22.6%
33	Carroll Lutheran Village	Westminster	MD	551	398	50	103	72.2%	9.1%	18.7%
34	St. Camillus	Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
35	Casa de las Campanas	San Diego	CA	548	377	72	99	68.8%	13.1%	18.1%
36	Rolling Green Village	Greenville	SC	544	420	50	74	77.2%	9.2%	13.6%
37	Royal Oaks Lifecare Community	Sun City	AZ	544	360	59	125	66.2%	10.8%	23.0%
38	Masonic Care Community of New York	Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
39	Fleet Landing	Atlantic Beach	FL	534	354	100	80	66.3%	18.7%	15.0%
40	The Mennonite Village	Albany	OR	524	298	131	95	56.9%	25.0%	18.1%
41	The Lutheran Home	Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
42	Advent Christian Village at Dowling Park	Live Oak	FL	510	309	40	161	60.6%	7.8%	31.6%
43	Masonic Home of New Jersey	Burlington	NJ	510	171	75	264	33.5%	14.7%	51.8%
44	The Advent Christian Village	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
45	St. Mark Village	Palm Harbor	FL	503	292	151	60	58.1%	30.0%	11.9%
46	Riddle Village	Media	PA	500	365	49	86	73.0%	9.8%	17.2%
47	Friendship Village Sunset Hills	St.Louis	MO	497	318	61	118	64.0%	12.3%	23.7%
48	Havenwood Heritage Heights	Concord	NH	497	347	55	95	69.8%	11.1%	19.1%
49	The Estates at Carpenters	Lakelanda	FL	496	372	52	72	75.0%	10.5%	14.5%
50	Lebanon Valley Brethren Home	Palmyra	PA	495	337	58	100	68.1%	11.7%	20.2%

6-1 2015 LeadingAge Ziegler 150

Additional Listings: Single-Campus Senior Living Communities

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

2015 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/14)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	Warm Hearth Village	Blacksburg	VA	495	285	150	60	57.6%	30.3%	12.1%
52	C. C. Young	Dallas	TX	493	240	119	134	48.7%	24.1%	27.2%
53	Marquette Manor	Indianapolis	IN	493	314	77	102	63.7%	15.6%	20.7%
54	Horizon House	Seattle	WA	476	386	90	0	81.1%	18.9%	0.0%
55	Montereau	Tulsa	OK	475	328	44	74	69.1%	9.3%	15.6%
56	Bridgewater Retirement Community	Bridgewater	VA	473	250	84	139	52.9%	17.8%	29.4%
57	Deerfield Episcopal Retirement Community	Asheville	NC	473	351	60	62	74.2%	12.7%	13.1%
58	Christian Health Care Center	Wyckoff	NJ	472	79	95	298	16.7%	20.1%	63.1%
59	Tel Hai Retirement Community	Honey Brook	PA	472	233	100	139	49.4%	21.2%	29.4%
60	Cypress Cove at HealthPark Florida, Inc.	Fort Myers	FL	470	362	44	64	77.0%	9.4%	13.6%
61	White Horse Village	Newtown Square	PA	470	343	68	59	73.0%	14.5%	12.6%
62	Marquardt Village	Watertown	WI	469	281	48	140	59.9%	10.2%	29.9%
63	Virginia Mennonite Retirement Community	Harrisonburg	VA	469	263	86	120	56.1%	18.3%	25.6%
64	Carolina Village, Inc.	Hendersonville	NC	465	347	60	58	74.6%	12.9%	12.5%
65	La Vida Llana	Albuquerque	NM	464	330	84	50	71.1%	18.1%	10.8%
66	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
67	Waterman Village	Mt. Dora	FL	454	255	79	120	56.2%	17.4%	26.4%
68	Paradise Valley Estates	Fairfield	CA	451	323	68	60	71.6%	15.1%	13.3%
69	Emerald Communities	Redmond	WA	450	333	56	61	74.0%	12.4%	13.6%
70	Lutheran Social Services of Upstate New York	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
71	Aldersgate Village	Topeka	KS	445	176	60	209	39.6%	13.5%	47.0%
72	Falcons Landing	Potomac Falls	VA	444	313	71	60	70.5%	16.0%	13.5%
73	Aldersgate	Charlotte	NC	442	250	92	100	56.6%	20.8%	22.6%
74	Cornwall Manor	Cornwall	PA	442	299	35	108	67.6%	7.9%	24.4%
75	Cathedral Village	Philadelphia	PA	441	293	0	148	66.4%	0.0%	33.6%

6-1 2015 LeadingAge Ziegler 150

Additional Listings: Single-Campus Senior Living Communities

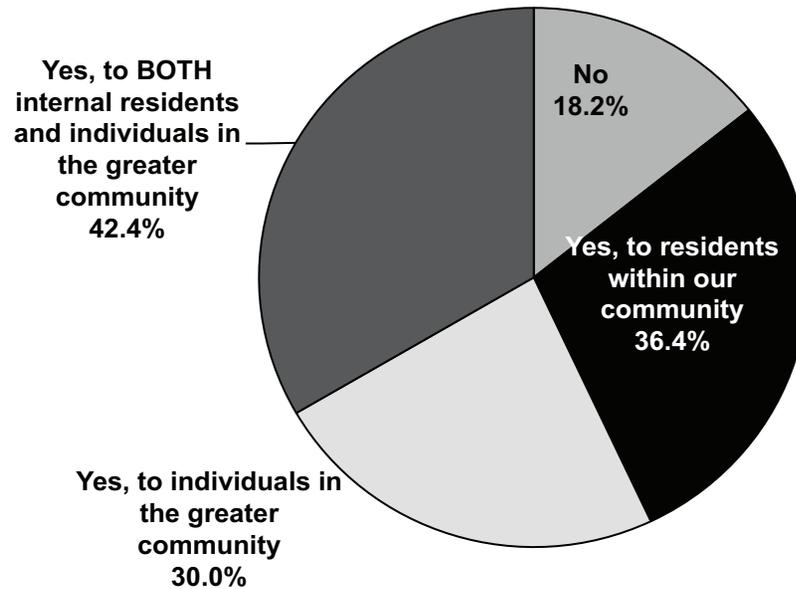
6-1a THE NATION'S 100 LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING

2015 Rank	System Name	City	State	Summary of Market Rate Units (as of 12/31/14)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	Greenwood Village South	Greenwood	IN	440	257	46	137	58.4%	10.5%	31.1%
77	Laurel Lake Retirement Community	Hudson	OH	439	291	73	75	66.3%	16.6%	17.1%
78	Asbury Pointe	Getzville	NY	438	110	56	272	25.1%	12.8%	62.1%
79	Carol Woods Retirement Community	Chapel Hill	NC	430	311	89	30	72.3%	20.7%	7.0%
80	Mt. San Antonio Gardens	Pomona	CA	430	287	71	72	66.7%	16.5%	16.7%
81	Williamsburg Landing, Inc.	Williamsburg	VA	430	311	61	58	72.3%	14.2%	13.5%
82	O'Connor Woods	Stockton	CA	428	251	77	100	58.6%	18.0%	23.4%
83	Forum at Rancho San Antonio	Cupertino	CA	425	319	58	48	75.1%	13.6%	11.3%
84	The Good Samaritan Home of Quincy	Quincy	IL	424	167	26	231	39.4%	6.1%	54.5%
85	Lutheran Community at Telford	Telford	PA	422	250	97	75	59.2%	23.0%	17.8%
86	Foulkeways at Gwynedd	Gwynedd	PA	416	309	59	48	74.3%	14.2%	11.5%
87	Glacier Hills, Inc	Ann Arbor	MI	416	141	114	161	33.9%	27.4%	38.7%
88	Meadowood	Worcester	PA	411	296	56	59	72.0%	13.6%	14.4%
89	Tabor Hills Senior Living Community	Naperville	IL	410	104	95	211	25.4%	23.2%	51.5%
90	Mease Manor	Dunedin	FL	406	205	106	95	50.5%	26.1%	23.4%
91	Westminster Canterbury of Lynchburg, Inc.	Lynchburg	VA	406	238	63	105	58.6%	15.5%	25.9%
92	Willamette View, Inc.	Portland	OR	405	287	112	6	70.9%	27.7%	1.5%
93	Indiana Masonic Home	Franklin	IN	404	183	84	137	45.3%	20.8%	33.9%
94	Friendship Village Chesterfield	Chesterfield	MO	403	282	22	99	70.0%	5.5%	24.6%
95	Penney Retirement Community	Penney Farms	FL	403	288	75	40	71.5%	18.6%	9.9%
96	Bay Village of Sarasota, Inc.	Sarasota	FL	402	285	22	95	70.9%	5.5%	23.6%
97	North Hill Communities, Inc.	Needham	MA	402	285	45	72	70.9%	11.2%	17.9%
98	St. Paul Homes	Greenville	PA	398	86	120	192	21.6%	30.2%	48.2%
99	Dunwoody Village	Newtown Square	PA	396	234	81	81	59.1%	20.5%	20.5%
100	Kahala Senior Living Community, Inc.	Honolulu	HI	393	270	63	60	68.7%	16.0%	15.3%
								59.2%	15.3%	25.4%

6.1 2015 LeadingAge Ziegler 150

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

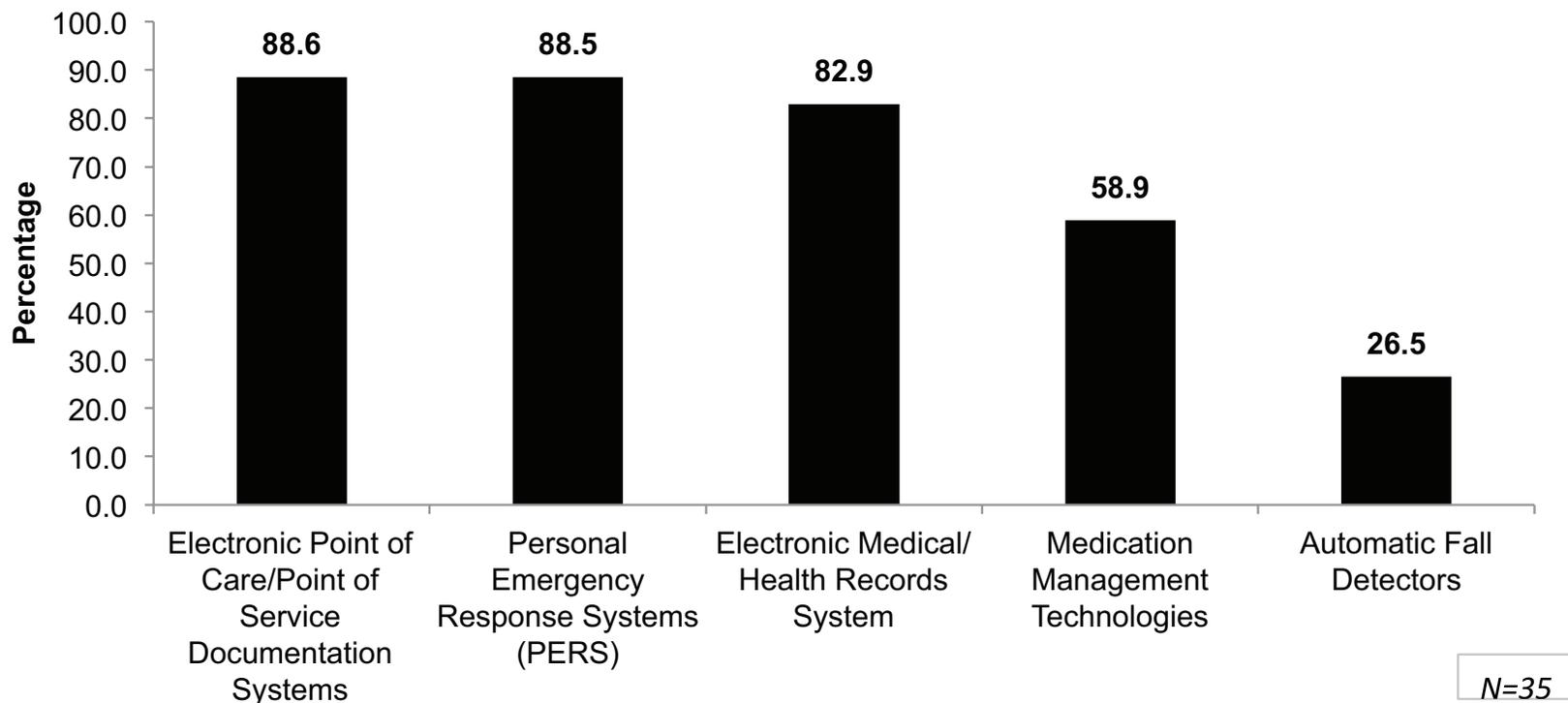
Do you currently offer any type of Home & Community-Based Services?



N=33

6.1 2015 LeadingAge Ziegler 150

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



6-1 2015 LeadingAge Ziegler 150

Additional Listings: Largest Individual Campuses Listing

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

2015 Rank	2013 Rank	System Name	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/14)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
1	1	Riderwood Village	National Senior Campuses	Silver Spring	MD	2,250	1,929	207	114	85.7%	9.2%	5.1%
2	2	Oak Crest Village	National Senior Campuses	Parkville	MD	1,858	1,525	133	200	82.1%	7.2%	10.8%
3	3	Charlestown		Catonsville	MD	1,815	1,484	125	206	81.8%	6.9%	11.3%
4	6	Shell Point Village	Christian Missionary Alliance	Fort Myers	FL	1,771	1,216	357	198	68.7%	20.2%	11.2%
5	4	Cedar Crest Village	National Senior Campuses	Pequannock	NJ	1,695	1,501	81	113	88.6%	4.8%	6.7%
6	5	Greenspring Village	National Senior Campuses	Springfield	VA	1,685	1,405	144	136	83.4%	8.5%	8.1%
7	9	John Knox Village		Lee's Summit	MO	1,622	1,078	158	386	66.5%	9.7%	23.8%
8	7	Ann's Choice	National Senior Campuses	Philadelphia	PA	1,617	1,485	44	88	91.8%	2.7%	5.4%
9	8	Brooksby Village	National Senior Campuses	Peabody	MA	1,542	1,344	94	104	87.2%	6.1%	6.7%
10	10	Masonic Village at Elizabethtown	Masonic Villages of the Grand Lodge of Pennsylvania	Elizabethtown	PA	1,539	961	125	453	62.4%	8.1%	29.4%
11	11	Seabrook Village	National Senior Campuses	Tinton Falls	NJ	1,269	1,088	95	86	85.7%	7.5%	6.8%
12	14	Maris Grove	National Senior Campuses	Glen Mills	PA	1,209	1,033	88	88	85.4%	7.3%	7.3%
13	12	Asbury Methodist Village	Asbury Communities	Gaithersburg	MD	1,200	810	133	257	67.5%	11.1%	21.4%
14	13	Linden Ponds	National Senior Campuses	Hingham	MA	1,120	988	0	132	88.2%	0.0%	11.8%
15	29	Charles E. Smith Life Communities		Rockville	MD	1,134	500	78	556	44.1%	6.9%	49.0%
16	15	Henry Ford Village		Dearborn	MI	1,041	856	96	89	82.2%	9.2%	8.5%
17	16	Friendship Village of Schaumburg	Friendship Senior Options	Schaumburg	IL	1,013	659	106	248	65.1%	10.5%	24.5%
18	17	Hebrew Home at Riverdale		Bronx	NY	1,004	134	0	870	13.3%	0.0%	86.7%
19	18	Panorama City		Lacey	WA	991	791	45	155	79.8%	4.5%	15.6%
20	19	John Knox Village of Florida		Pompano Beach	FL	970	729	64	177	75.2%	6.6%	18.2%
21	20	Willow Valley Lakes Manor	Willow Valley Retirement Communities	Lancaster	PA	955	732	146	77	76.6%	15.3%	8.1%
22	21	Fox Run Village	National Senior Campuses	Novi	MI	881	749	44	88	85.0%	5.0%	10.0%
23	23	Westminster-Canterbury Richmond		Richmond	VA	837	510	169	158	60.9%	20.2%	18.9%
24	NR	Jewish Home Lifecare-Manhattan	Jewish Home Lifecare	New York	NY	816	0	0	816	0.0%	0.0%	100.0%
25	24	St. John's Home & Meadows		Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%

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

6-1 2015 LeadingAge Ziegler 150

Additional Listings: Largest Individual Campuses Listing

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

2015 Rank	2013 Rank	System Name	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/14)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
26	25	Cross Keys Village - The Brethren Home Community		New Oxford	PA	812	451	91	270	55.5%	11.2%	33.3%
27	26	Friendship Village of Tempe		Tempe	AZ	794	575	91	128	72.4%	11.5%	16.1%
28	28	Rogue Valley Manor	Pacific Retirement Services	Medford	OR	792	605	83	104	76.4%	10.5%	13.1%
29	27	Menorah Park Center for Senior Living		Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
30	30	Greencroft Goshen	Greencroft, Inc.	Goshen	IN	778	409	129	240	52.6%	16.6%	30.8%
31	34	Luther Manor - Wauwatosa Campus	Luther Manor	Wauwatosa	WI	762	381	158	223	50.0%	20.7%	29.3%
32	35	Heritage Pointe	United Methodist Memorial Home	Warren	IN	760	152	409	199	20.0%	53.8%	26.2%
33	31	Brethren Village		Lititz	PA	758	497	141	120	65.6%	18.6%	15.8%
34	32	Lakeview Village		Lenexa	KS	753	555	26	172	73.7%	3.5%	22.8%
35	33	Mennonite Home Communities		Lancaster	PA	753	415	150	188	55.1%	19.9%	25.0%
36	NR	Ashby Ponds	National Senior Campuses	Ashburn	VA	749	637	68	44	85.0%	9.1%	5.9%
37	36	Otterbein Lebanon Retirement Community	Otterbein Retirement Communities	Lebanon	OH	746	442	48	256	59.2%	6.4%	34.3%
38	47	Laclede Groves	Lutheran Senior Services	Webster Groves	MO	733	380	133	220	51.8%	18.1%	30.0%
39	38	Glencroft Retirement Community		Glendale	AZ	715	391	123	201	54.7%	17.2%	28.1%
40	37	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	715	330	249	136	46.2%	34.8%	19.0%
41	40	Willow Valley Manor North	Willow Valley Retirement Communities	Lancaster	PA	711	472	107	132	66.4%	15.0%	18.6%
42	43	Western Home Communities - Main Campus	Western Home Communities	Cedar Falls	IA	704	374	230	100	53.1%	32.7%	14.2%
43	41	Garden Spot Village	Garden Spot Village	New Holland	PA	701	542	86	73	77.3%	12.3%	10.4%
44	44	Atlantic Shores		Virginia Beach	VA	671	555	66	50	82.7%	9.8%	7.5%
45	NR	Waverly Gardens	Presbyterian Homes and Services	North Oaks	MN	669	77	429	163	11.5%	64.1%	24.4%
46	45	Raybrook Manor	Holland Home	Grand Rapids	MI	665	299	265	101	45.0%	39.8%	15.2%
47	39	St. Ann's Community	St. Ann's Community	Rochester	NY	662	120	0	542	18.1%	0.0%	81.9%
48	46	Miami Jewish Health Systems		Miami	FL	656	102	92	462	15.5%	14.0%	70.4%
49	48	The Beatitudes Campus		Phoenix	AZ	652	459	121	72	70.4%	18.6%	11.0%
50	49	Copeland Oaks		Sebring	OH	638	341	107	190	53.4%	16.8%	29.8%

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

6-1 2015 LeadingAge Ziegler 150

Additional Listings: Largest Individual Campuses Listing

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

2015 Rank	2013 Rank	System Name	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/14)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
51	NR	Loretto Brighton Campus	Loretto	Syracuse	NY	633	0	79	554	0.0%	12.5%	87.5%
52	52	Kissimmee Good Samaritan Retirement Village	Evangelical Lutheran Good Samaritan Society	Kissimmee	FL	631	428	33	170	67.8%	5.2%	26.9%
53	50	The Village in Gainesville	SantaFe SeniorLiving	Gainesville	FL	630	497	133	0	78.9%	21.1%	0.0%
54	51	Westminster-Canterbury on Chesapeake Bay		Virginia Beach	VA	629	439	95	95	69.8%	15.1%	15.1%
55	53	Landis Homes		Lititz	PA	622	438	81	103	70.4%	13.0%	16.6%
56	55	Messiah Village	Messiah Lifeways	Mechanicsburg	PA	619	278	157	184	44.9%	25.4%	29.7%
57	58	Carolina Meadows		Chapel Hill	NC	616	447	79	90	72.6%	12.8%	14.6%
58	NR	Fellowship Square Tucson	Christian Care Companies	Tucson	AZ	616	612	4	0	99.4%	0.6%	0.0%
59	57	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	41.6%	14.8%	43.6%
60	56	La Posada at Park Centre		Green Valley	AZ	608	463	145	0	76.2%	23.8%	0.0%
61	59	Air Force Village West		Riverside	CA	591	440	92	59	74.5%	15.6%	10.0%
62	60	Springmoor Life Care Retirement Community		Raleigh	NC	589	398	18	173	67.6%	3.1%	29.4%
63	54	St. Joseph's John Knox Village	St. Joseph's Health System	Tampa	FL	589	265	161	163	45.0%	27.3%	27.7%
64	61	The Army Residence Community		San Antonio	TX	584	445	48	91	76.2%	8.2%	15.6%
65	64	Windcrest Village	National Senior Campuses	Highlands Ranch	CO	583	574	9	0	98.5%	1.5%	0.0%
66	62	Oakwood Village University Woods	Oakwood Lutheran Senior Ministries	Madison	WI	577	382	100	95	66.2%	17.3%	16.5%
67	65	Bristol Village	National Church Residences	Waverly	OH	576	455	46	75	79.0%	8.0%	13.0%
68	70	Twin Lakes Community		Burlington	NC	572	400	52	120	69.9%	9.1%	21.0%
69	66	Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	70.3%	17.6%	12.1%
70	67	The Philadelphia Protestant Home		Philadelphia	PA	567	266	175	126	46.9%	30.9%	22.2%
71	93	Luther Acres Retirement Community	LutherCare	Lititz	PA	566	346	114	106	61.1%	20.1%	18.7%
72	68	Moorings Park		Naples	FL	563	384	73	106	68.2%	13.0%	18.8%
73	22	Franklin United Methodist Community		Franklin	IN	563	194	161	208	34.5%	28.6%	36.9%
74	94	Pine Run Retirement Community	Doylestown Hospital	Doylestown	PA	561	288	146	127	51.3%	26.0%	22.6%
75	72	Presbyterian Village North	Presbyterian Communities & Services	Dallas	TX	556	250	75	231	45.0%	13.5%	41.5%

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

6-1 2015 LeadingAge Ziegler 150

Additional Listings: Largest Individual Campuses Listing

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

2015 Rank	2013 Rank	System Name	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/14)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
76	73	Ashlar Village	Masonicare	Wallingford	CT	553	362	191	0	65.5%	34.5%	0.0%
77	90	Blue Skies East	Blue Skies of Texas	San Antonio	TX	553	371	78	104	67.1%	14.1%	18.8%
78	76	Carroll Lutheran Village		Westminster	MD	551	398	50	103	72.2%	9.1%	18.7%
79	75	St. Camillus		Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
80	78	Mayflower Gardens	Retirement Housing Foundation	Lancaster	CA	548	500	0	48	91.2%	0.0%	8.8%
81	80	Casa de las Campanas		San Diego	CA	548	377	72	99	68.8%	13.1%	18.1%
82	79	Croasdaile	United Methodist Retirement Homes	Durham	NC	546	402	30	114	73.6%	5.5%	20.9%
83	81	Rolling Green Village		Greenville	SC	544	420	50	74	77.2%	9.2%	13.6%
84	71	Royal Oaks		Sun City	AZ	544	360	59	125	66.2%	10.8%	23.0%
85	82	Phoebe Home	Phoebe Ministries	Allentown	PA	541	88	58	395	16.3%	10.7%	73.0%
86	77	Westminster Place	Presbyterian Homes	Evanston	IL	538	254	96	188	47.2%	17.8%	34.9%
87	63	Good Samaritan Village of Hastings	Evangelical Lutheran Good Samaritan Society	Hastings	NE	537	306	51	180	57.0%	9.5%	33.5%
88	85	Westminster Oaks	Westminster Communities of Florida	Tallahasee	FL	536	329	87	120	61.4%	16.2%	22.4%
89	83	Masonic Care Community of New York		Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
90	NR	Fleet Landing		Atlantic Beach	FL	534	354	100	80	66.3%	18.7%	15.0%
91	84	Mission Ridge & St. John's Lutheran Home	St. John's Lutheran Ministries	Billings	MT	534	122	226	186	22.8%	42.3%	34.8%
92	88	Windsor Park Manor	Covenant Retirement Communities	Carol Stream	IL	532	358	93	81	67.3%	17.5%	15.2%
93	NR	Magnolia Manor- Americus Campus	Magnolia Manor	Americus	GA	524	298	131	95	56.9%	25.0%	18.1%
94	92	The Mennonite Village		Albany	OR	524	276	81	167	52.7%	15.5%	31.9%
95	91	Cristwood Retirement Community	CRISTA	Seattle	WA	524	276	81	167	52.7%	15.5%	31.9%
96	96	Boutwells Landing	Presbyterian Homes and Services	Oak Park Heights	MN	519	316	95	108	60.9%	18.3%	20.8%
97	NR	Givens Estates Campus	Givens Estates	Asheville	NC	516	385	61	70	74.6%	11.8%	13.6%
98	99	The Lutheran Home		Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
99	97	Blue Skies West	Air Force Villages	San Antonio	TX	513	406	51	56	79.1%	9.9%	10.9%
100	74	Passavant Retirement Community	Lutheran SeniorLife	Zelienople	PA	513	187	168	158	36.5%	32.7%	30.8%

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

6-2 2015 LeadingAge Ziegler 150

Additional Listings: Affordable Housing Providers

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

2015 Aff. Hsng. Rank	2014 Aff. Hsng. Rank	System Name	State	Units	Communities
1	1	National Church Residences	OH	21,818	323
2	3	Retirement Housing Foundation	CA	11,198	124
3	4	Volunteers of America	VA	9,939	175
4	2	Mercy Housing Inc.	CO	5,455	100
5	5	Christian Church Homes of Northern California	CA	5,052	61
6	7	Senior Housing Assistance Group	WA	4,628	27
7	21	Satellite Affordable Housing Associates	CA	3,000	52
8	9	TELACU Residential Management	CA	2,625	35
9	10	Cornerstone Affiliates	CA	2,506	34
10	11	Catholic Housing Management	FL	2,246	14
11	16	Christopher Homes	LA	2,183	18
12	12	CARING Housing Ministries	CA	2,127	9
13	14	United Church Homes, Inc.	OH	2,074	49
14	15	Westminster Communities of Florida	FL	2,032	10
15	31	Wesley Living (fka Wesley Senior Ministries)	TN	2,000	28
16	13	Presby's Inspired Life	PA	1,985	27
17	8	be.group	CA	1,844	26
18	18	Catholic Charities Senior Communities	MD	1,790	24
19	17	Springpoint Senior Living, Inc.	NJ	1,754	18
20	19	Salvation Army Silvercrest Management of California	CA	1,678	19
21	20	Consecre Housing Network	IL	1,617	26
22	32	Presbyterian Villages of Michigan	MI	1,504	23
23	22	Oklahoma City Housing Authority	OK	1,386	10
24	23	Catholic Charities of Chicago	IL	1,372	20
25	24	Evangelical Lutheran Good Samaritan Society	SD	1,351	32

NR: Not Ranked in the previous year

6-2 2015 LeadingAge Ziegler 150

Additional Listings: Affordable Housing Providers

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

2015 Aff. Hsng. Rank	2014 Aff. Hsng. Rank	System Name	State	Units	Communities
26	25	Victory Housing	MD	1,347	16
27	28	Lutheran Social Services of Illinois	IL	1,255	17
28	26	New Samaritan Corporation	CT	1,251	31
29	27	Menorah Housing Foundation	CA	1,221	18
30	29	Jewish Community Housing for the Elderly	MA	1,117	8
31	33	Pacific Retirement Services	OR	1,045	25
32	34	Presbyterian SeniorCare	PA	999	22
33	35	Presbyterian Senior Living	PA	977	10
34	36	Union Labor Retirement Association	OR	900	6
35	37	Lutheran Social Services of Central Ohio	OH	880	19
36	38	Wesley Woods Senior Living	GA	874	4
37	39	Selfhelp Community Services	NY	864	5
38	40	Episcopal Retirement Homes, Inc.	OH	837	9
39	41	Christian Care Communities, Inc.	KY	805	12
40	42	Hebrew SeniorLife	MA	765	3
41	43	Avesta Housing	ME	742	34
42	44	DePaul Housing Management Corporation	NY	704	14
43	45	Lutheran Homes Society	OH	651	11
44	46	Aging True	FL	637	4
45	47	Episcopal Senior Communities	CA	626	6
46	48	St. Andrew's Resources for Seniors System	MO	604	13
47	49	Northern California Presbyterian Homes and Services, Inc.	CA	599	3
48	55	Jewish Home Lifecare	NY	554	5
49	50	Community Housing Management Services	CA	548	11
50	51	Jewish Senior Life of Metropolitan Detroit	MI	538	0

NR: Not Ranked in the previous year

6-2 2015 LeadingAge Ziegler 150

Additional Listings: Affordable Housing Providers

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

2015 Aff. Hsng. Rank	2014 Aff. Hsng. Rank	System Name	State	Units	Communities
51	52	The Lesley Foundation	CA	534	5
52	53	Christian Concern Management and Development Corporation	PA	515	6
53	60	Ecumen	MN	507	10
54	30	LSC Service Corp	OH	492	3
55	56	Plano Community Home Sponsored Properties	TX	474	8
56	57	Lutheran Senior Services	MO	459	6
57	58	Presbyterian Homes of Georgia, Inc.	GA	458	2
58	59	CJE SeniorLife	IL	455	7
59	54	Lutheran Social Ministries of New Jersey	NJ	430	6
60	61	Jewish Community Housing Corporation	NJ	369	3
61	62	Bethany Community Services	MA	364	3
62	63	Phoebe Ministries	PA	356	8
63	64	Greencroft Communities	IN	352	2
64	65	Lutheran Social Services of Michigan	MI	340	5
65	67	Goodwill Industries Suncoast	FL	335	5
66	66	Diakon Lutheran Social Ministries	PA	335	4
67	68	Lincoln Lutheran	WI	335	2
68	69	Family Housing Management Co., Inc.	FL	326	3
69	70	Spokane Baptist Association Homes	WA	321	2
70	71	Methodist Retirement Communities	TX	318	5
71	72	Mississippi Methodist Senior Services, Inc.	MS	313	0
72	6	Elderly Housing Management Corp.,Inc..	FL	301	2
73	73	United Methodist Homes of New Jersey	NJ	300	5
74	74	Presbyterian Homes and Services	MN	293	3
75	75	Augustana Care Corporation	MN	271	0

NR: Not Ranked in the previous year

6-2 2015 LeadingAge Ziegler 150

Additional Listings: Affordable Housing Providers

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

2015 Aff. Hsng. Rank	2014 Aff. Hsng. Rank	System Name	State	Units	Communities
76	76	Porter Hills	MI	270	6
77	NR	Lutheran SeniorLife	PA	269	7
78	77	Santa Clara Methodist Retirement Foundation	CA	257	2
79	96	United Church Homes and Services	NC	252	7
80	78	Christian Care Companies	AZ	247	3
81	79	Maple Knoll Communities, Inc.	OH	243	3
82	80	Sholom Community Alliance	MN	233	3
83	81	Wellspring Lutheran Services	MI	231	5
84	NR	United Methodist Retirement Communities, Inc.	MI	228	3
85	82	Lutheran Homes of Oshkosh	WI	217	1
86	84	Woodmere and Crescent Park Senior Housing	NJ	200	2
87	86	Saint Elizabeth Community	RI	197	1
88	87	Lutheran Social Services Group	NY	196	6
89	88	Givens Estates	NC	178	2
90	89	Jewish Senior Housing & Healthcare	NJ	178	2
91	90	Guardian Angels of Elk River	MN	177	5
92	91	Milton Residences for the Elderly	MA	167	3
93	94	Providence Life Services	IL	161	2
94	NR	Ohio Presbyterian Retirement Services	OH	150	1
95	95	Presbyterian Senior Care of WNY, Inc.	NY	150	1
96	98	Presbyterian Homes and Services	NY	148	0
97	99	Franciscan Communities, Inc.	IL	139	3
98	NR	Christian Homes, Inc.	IL	130	2
99	100	Evangelical Homes of Michigan	MI	130	3
100	NR	Presbyterian Homes	IL	108	3

NR: Not Ranked in the previous year

6-3 2015 LeadingAge Ziegler 150

Additional Listings: Multi-site Senior Living Providers

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

Rank	2015 LZ 150 Rank	System Name	State	Units (as of 12/31/14)				
				Total	ILU	ALU	NCB	AFF
1	30	National Church Residences	OH	23,673	778	535	542	21,818
2	2	Evangelical Lutheran Good Samaritan Society	SD	19,399	5,032	2,262	10,754	1,351
3	1	National Senior Campuses	MD	18,122	15,503	1,270	1,349	0
4	6	Retirement Housing Foundation	CA	15,296	2,642	861	595	11,198
5	21	Volunteers of America	VA	12,274	480	707	1,148	9,939
6	3	ACTS Retirement-Life Communities	PA	7,993	5,652	904	1,437	0
7	4	Presbyterian Homes and Services	MN	7,160	3,332	2,077	1,458	293
8	12	Cornerstone Affiliates	CA	5,603	1,858	557	682	2,506
9	NR	Mercy Housing Inc.	CO	5,455	0	0	0	5,455
10	10	Westminster Communities of Florida	FL	5,285	2,031	471	751	2,032
11	NR	Christian Church Homes of Northern California	CA	5,052	0	0	0	5,052
12	5	Covenant Retirement Communities, Inc.	IL	4,865	3,098	818	949	0
13	NR	Senior Housing Assistance Group	WA	4,628	0	0	0	4,628
14	11	Presbyterian Senior Living	PA	4,097	1,503	498	1,119	977
15	7	Lifespace Communities, Inc.	IA	4,069	3,086	154	829	0
16	15	Pacific Retirement Services	OR	3,871	2,086	333	407	1,045
17	9	Lutheran Senior Services	MO	3,865	1,665	752	989	459
18	8	The Kendal Corporation	PA	3,732	2,522	649	561	0
19	25	Springpoint Senior Living, Inc.	NJ	3,721	1,429	271	267	1,754
20	13	Ecumen	MN	3,530	290	2,106	627	507
21	50	be.group	CA	3,196	854	267	231	1,844
22	14	Ohio Presbyterian Retirement Services	OH	3,160	1,516	617	877	150
23	74	United Church Homes, Inc.	OH	3,043	177	145	647	2,074
24	NR	Satellite Affordable Housing Associates	CA	3,000	0	0	0	3,000
25	75	Presby's Inspired Life	PA	2,945	493	207	260	1,985

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

6-3 2015 LeadingAge Ziegler 150

Additional Listings: Multi-site Senior Living Providers

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

Rank	2015 LZ 150 Rank	System Name	State	Units (as of 12/31/14)				
				Total	ILU	ALU	NCB	AFF
26	16	Front Porch Communities and Services	CA	2,923	1,838	447	538	100
27	17	Asbury Communities	MD	2,774	1,941	335	498	0
28	56	Presbyterian Villages of Michigan	MI	2,757	836	239	178	1,504
29	19	Diakon Lutheran Social Ministries	PA	2,742	903	535	969	335
30	NR	TELACU Residential Management	CA	2,625	0	0	0	2,625
31	18	Presbyterian Manors of Mid-America, Inc.	KS	2,415	837	591	987	0
32	20	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,366	1,436	861	69	0
33	36	Hebrew SeniorLife	MA	2,358	660	119	814	765
34	22	Christian Homes, Inc.	IL	2,297	387	306	1,474	130
35	NR	Catholic Housing Management	MD	2,246	0	0	0	2,246
36	NR	Christopher Homes	LA	2,183	0	0	0	2,183
37	40	Episcopal Senior Communities	CA	2,176	1,054	120	376	626
38	27	Augustana Care	MN	2,172	0	1,120	781	271
39	38	Jewish Home Lifecare	NY	2,139	24	0	1,561	554
40	NR	CARING Housing Ministries	CA	2,127	0	0	0	2,127
41	65	Presbyterian SeniorCare	PA	2,113	348	351	415	999
42	26	Franciscan Communities, Inc.	IL	2,083	736	433	775	139
43	23	Shell Point	FL	2,049	1,332	389	328	0
44	32	Christian Care Companies	AZ	2,036	1,434	289	66	247
45	24	Willow Valley Communities	PA	2,033	1,536	222	275	0
46	NR	Wesley Living (fka Wesley Senior Ministries)	TN	2,000	0	0	0	2,000
47	28	Concordia Lutheran Ministries	PA	1,873	554	965	354	0
48	29	Senior Quality Lifestyles Corporation	TX	1,858	1,130	419	309	0
49	31	Otterbein Senior Lifestyle Choices	OH	1,811	722	382	707	0
50	NR	Catholic Charities Senior Communities	MD	1,790	0	0	0	1,790

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

6-3 2015 LeadingAge Ziegler 150

Additional Listings: Multi-site Senior Living Providers

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

Rank	2015 LZ 150 Rank	System Name	State	Units (as of 12/31/14)				
				Total	ILU	ALU	NCB	AFF
51	33	Elim Care, Inc.	MN	1,776	197	451	1,080	48
52	35	Providence Life Services	IL	1,764	665	360	578	161
53	48	Greencroft Communities	IN	1,761	520	390	499	352
54	45	Mississippi Methodist Senior Services, Inc.	MS	1,755	807	315	320	313
55	34	Homewood Retirement Centers	MD	1,694	965	278	451	0
56	NR	Salvation Army Silvercrest Management of California	CA	1,678	0	0	0	1,678
57	90	Christian Care Communities, Inc.	KY	1,644	185	186	468	805
58	NR	Consegra Housing Network	IL	1,617	0	0	0	1,617
59	59	Phoebe Ministries	PA	1,586	374	175	681	356
60	37	Buckner Retirement Services, Inc.	TX	1,585	857	372	356	0
61	39	Eskaton	CA	1,562	531	605	426	0
62	44	Presbyterian Homes	IL	1,553	855	225	365	108
63	78	Northern California Presbyterian Homes and Services, Inc.	CA	1,548	706	102	141	599
64	41	Magnolia Manor	GA	1,483	339	335	809	0
65	42	Loretto	NY	1,475	259	593	623	0
66	43	Bethesda Senior Living Communities	CO	1,467	155	1,312	0	0
67	46	WesleyLife	IA	1,431	692	301	438	0
68	51	Wesley Enhanced Living	PA	1,422	829	193	300	100
69	47	Holland Home	MI	1,419	723	435	261	0
70	NR	Oklahoma City Housing Authority	OK	1,386	0	0	0	1,386
71	49	Bethesda Health Group, Inc.	MO	1,375	555	18	802	0
72	67	Lutheran SeniorLife	PA	1,375	472	192	442	269
73	NR	Catholic Charities of Chicago	IL	1,372	0	0	0	1,372
74	116	Lutheran Homes Society	OH	1,353	141	172	389	651
75	NR	Victory Housing	MD	1,347	0	0	0	1,347

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

6-3 2015 LeadingAge Ziegler 150

Additional Listings: Multi-site Senior Living Providers

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

Rank	2015 LZ 150 Rank	System Name	State	Units (as of 12/31/14)				
				Total	ILU	ALU	NCB	AFF
76	71	United Methodist Homes of New Jersey	NJ	1,326	88	686	252	300
77	120	St. Andrew's Resources for Seniors System	MO	1,288	337	164	183	604
78	52	Baptist Village Communities	OK	1,280	774	181	325	0
79	53	Lutheran Life Ministries (fka Lutheran Life Communities)	IL	1,271	233	291	747	0
80	54	Masonicare, Inc.	CT	1,264	458	277	529	0
81	55	Lutheran Services Carolinas	NC	1,262	257	273	732	0
82	NR	Lutheran Social Services of Illinois	IL	1,255	0	0	0	1,255
83	NR	New Samaritan Corporation	CT	1,251	0	0	0	1,251
84	57	SantaFe Senior Living	FL	1,231	876	255	100	0
85	58	Virginia United Methodist Homes, Inc.	VA	1,231	515	435	281	0
86	NR	Menorah Housing Foundation	CA	1,221	0	0	0	1,221
87	60	Friendship Senior Options	IL	1,213	783	182	248	0
88	77	United Church Homes and Services	NC	1,203	533	90	328	252
89	Nxt 50	Episcopal Retirement Homes, Inc.	OH	1,202	237	44	84	837
90	61	American Baptist Homes of the Midwest	MN	1,200	374	209	617	0
91	62	Virginia Baptist Homes	VA	1,192	748	225	219	0
92	Nxt 50	Lutheran Social Services of Central Ohio	OH	1,179	0	174	125	880
93	63	Integrace (fka EMA)	MD	1,150	645	228	277	0
94	64	Lutheran Social Services of South Central Pennsylvania	PA	1,149	554	251	344	0
95	NR	Jewish Community Housing for the Elderly	MA	1,117	0	0	0	1,117
96	66	United Methodist Memorial Home	IN	1,110	249	513	348	0
97	124	Lutheran Social Ministries of New Jersey	NJ	1,108	281	130	267	430
98	103	Lutheran Social Services of Michigan	MI	1,105	289	120	356	340
99	106	Methodist Retirement Communities	TX	1,079	318	229	214	318
100	68	United Methodist Homes	NY	1,057	390	241	426	0

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

LZ 150 Charts

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