



22nd Anniversary Edition

LZ 200

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

2025

LeadingAge Ziegler

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Producing the LZ 200



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LeadingAge Ziegler 200. The nation's 200 largest not-for-profit multi-site senior living organizations.

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LeadingAge®

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

A Note from LeadingAge

LeadingAge is pleased to partner with Ziegler to bring you the 22nd edition of the LeadingAge Ziegler 200 ("LZ 200").

Since its inception in 2004, the LZ 200 has become a highly anticipated annual report of the largest, most complex not-for-profit senior living organizations. Our 2025 report demonstrates the significant role that LeadingAge nonprofit member organizations play in the aging services field. From the oldest to the newest, the largest to the smallest, each organization has a unique story that includes commitment, community engagement, stewardship, resilience, and a reputation for excellence.

Today, LeadingAge members are creatively addressing complex challenges. Governing boards and senior leaders are engaging in effective strategic planning to reposition, grow, change, partner, innovate, and venture into new service possibilities. The following publication 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, offering their experiences and strategies to the entire field.

At the same time, they are helping to increase public understanding of the aging services and supports our sector provides.

The LeadingAge Ziegler 200 is not designed to be a qualitative report, nor an endorsement of any specific organization. Each organization ranking represents strong governance and powerful leadership dedicated to quality services and long-term success.

LeadingAge is committed to serving as the trusted voice for aging for all providers in our field. I thank you for your interest and ongoing support of this report.



Katie Smith Sloan
President and CEO
LeadingAge





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

A Note from Ziegler

We are excited to release the 22nd edition of the LeadingAge Ziegler publication, compiling data from the largest 200 not-for-profit senior living providers in the country. LeadingAge has been the ideal partner for this research initiative, and we look forward to seeing providers, industry professionals and key stakeholders take full advantage of the wealth of information this publication provides. This year's report, highlighting the 200 largest not-for-profit providers, represents more than 300,000 market-rate units and nearly 1,600 market-rate communities across the country. The report also highlights the largest single-site providers, the largest providers of Affordable Housing for seniors and the providers who are providing sizeable management services to other senior living & care communities.

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

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

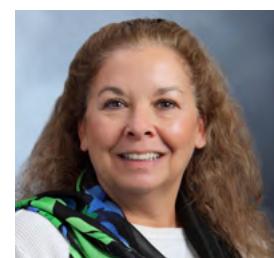
We would sincerely like to thank the teams at LeadingAge and Ziegler who make this publication possible. We would also like to give special thanks to all the providers who take the time to share their information and who embrace this publication year after year. As always, if you have any questions or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

Enjoy the 2025 LeadingAge Ziegler 200 publication!



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The LeadingAge Ziegler 200



History

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

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

The 2025 LeadingAge Ziegler 200 lists the largest not-for-profit systems providing aging services through senior living in the United States, in order of total owned market-rate units, as of **December 31, 2024**.

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

¹2025 ranking data and amounts provided by LSEG as of 12/31/24.

Chapter 1

Understanding the LeadingAge Ziegler 200

Importance of Not-for-Profits

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

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

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

The LeadingAge Ziegler 200 (LZ 200)

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

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

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

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





Chapter 2

The Largest 200

A Quantitative Listing

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

Methodology

Defining a Multi-site Organization

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

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

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

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

the primary LZ 200 listing. Rankings for providers of affordable housing are included in Chapter 4 of the report. In previous years, systems that were comprised primarily of acute or post-acute services or health care systems were also excluded. Beginning with the 2016 report, additional systems were included to reflect not-for-profit health systems that have a separate division, or ministry, with a distinct focus on operating as a senior living system. Two examples of such a system are Benedictine and Trinity Health Senior Communities.

Compiling the Listing

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

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

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

Data used for ranking the 2025 LZ 200 were provided and confirmed ("confirmation") by 162 of the 200 organizations. Nine confirmations were received from the "Over 200," the organizations ranked from 201 to 221.

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

Key Findings

- ***An understanding of size*** ... The systems range from 23,329 units to 371 units.
- ***Information on unit mix*** ... The 10 largest providers of senior living represent nearly 30% of the total number of units for all systems in LZ 200.
- ***An appreciation of the rate of growth*** ... In the last 10 years, the average annual growth rate in total units is 2.3%, 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 64% of the LZ 200 offering specialized memory care units.
- ***Insights into type of growth*** ... The LZ 200 have grown primarily through expansion, with the number of units via new campus growth having slowed in the past several years. Most of the growth in recent years has been from within existing campuses in the form of unit expansions. At the same time, organizations continue to dispose of dated nursing homes or financially stressed communities. Recent years have also seen an uptick in the number of organizations growing through affiliation, acquisition or merger.
- ***Home and community-based services*** ... Growth is also taking place in the form of home-based services, such as home health, home care, adult-day care, continuing care at home (CCaH) programs or PACE (Program for All-Inclusive Care for the Elderly). Of the LZ 200, 46% offer some type of home and community-based services to non-residents. This year, the CCaH model, which had gained popularity in the past, is offered by 12% of the LZ 200 (a 4% decrease from last year).
- ***A glimpse of the geography*** ... The systems provide market-rate senior living in 47 states. Pennsylvania hosts the highest number of system headquarters in the LZ 200. Minnesota has the largest total number of communities, with 248.



- ***Technology*** ... On average, 73% of the LZ 200 communities have adopted electronic point of care/point of service documentation systems and electronic health/medical records. Adoption is generally lower for health and wellness technologies, such as medication monitoring or telehealth remote monitoring; and care/case management and coordination reveals that 57% use this software. A category added in 2020, social connectedness/resident engagement, reveals that 60% use this technology; and 47% system providers utilize more advanced analytical tools. Due to the pandemic, two new categories were added in 2021, 50% implemented staff and resident screening, and 51% added infection control technologies. In 2022, we added two new categories regarding robotic technology, 32% have implemented robotic process automation while 68% have added physical robotics.
- ***Joint ventures and partnerships*** ... As was reported in the 2024 report, 49% of LZ 200 organizations are engaged in a formal joint venture, most commonly with another provider, a health system, or a home health/home care agency.

Chapter 3

Rankings

The LZ 200 Not-for-profit Multi-site Senior Living Organization Rankings

Data can be 'cut and sliced' across a variety of time periods: one year, five years, 10 years, or more. The growth of some LZ 200 organizations may be most dramatic across a five-year period; others may have more change across a 10-year period. Nearly every listing of this sort focuses first, however, on annual change. Therefore, the **Primary Ranking** (Chart 3-1a) of the LZ 200 is by total senior living units with the 2025 and 2024 rank shown. Charts 3-1b-d rank the organizations by market-rate independent living units, by assisted living units and, finally, by nursing care beds. When the 2025 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations.

The **2025 Rank** column displays the numerical ranking of each system according to its 12/31/24 data within the LZ 200 for each of the four listings: 1) Total Senior Living Units, i.e., the **Primary Ranking** (Chart 3-1a); 2) Total Independent Living Units (Chart 3-1b); 3) Total Assisted Living Units (Chart 3-1c); and 4) Total Nursing Care Beds (Chart 3-1d).

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

The 2024 Rank shows the numerical ranking of the listed organization in last year's publication (according to its 12/31/23 data) listing of the same type. The organizations that show "NR" (Not Ranked) were not included in the LZ 200 rankings for 2024. Also note that with the increase to the largest 200 in the 2024 publication, the "Over 200" connotes a different meaning than in previous years when the rankings ended at 100. The "Over 200" in the current publication represent organizations ranked 201 through 221 as of 12/31/2024.

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

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

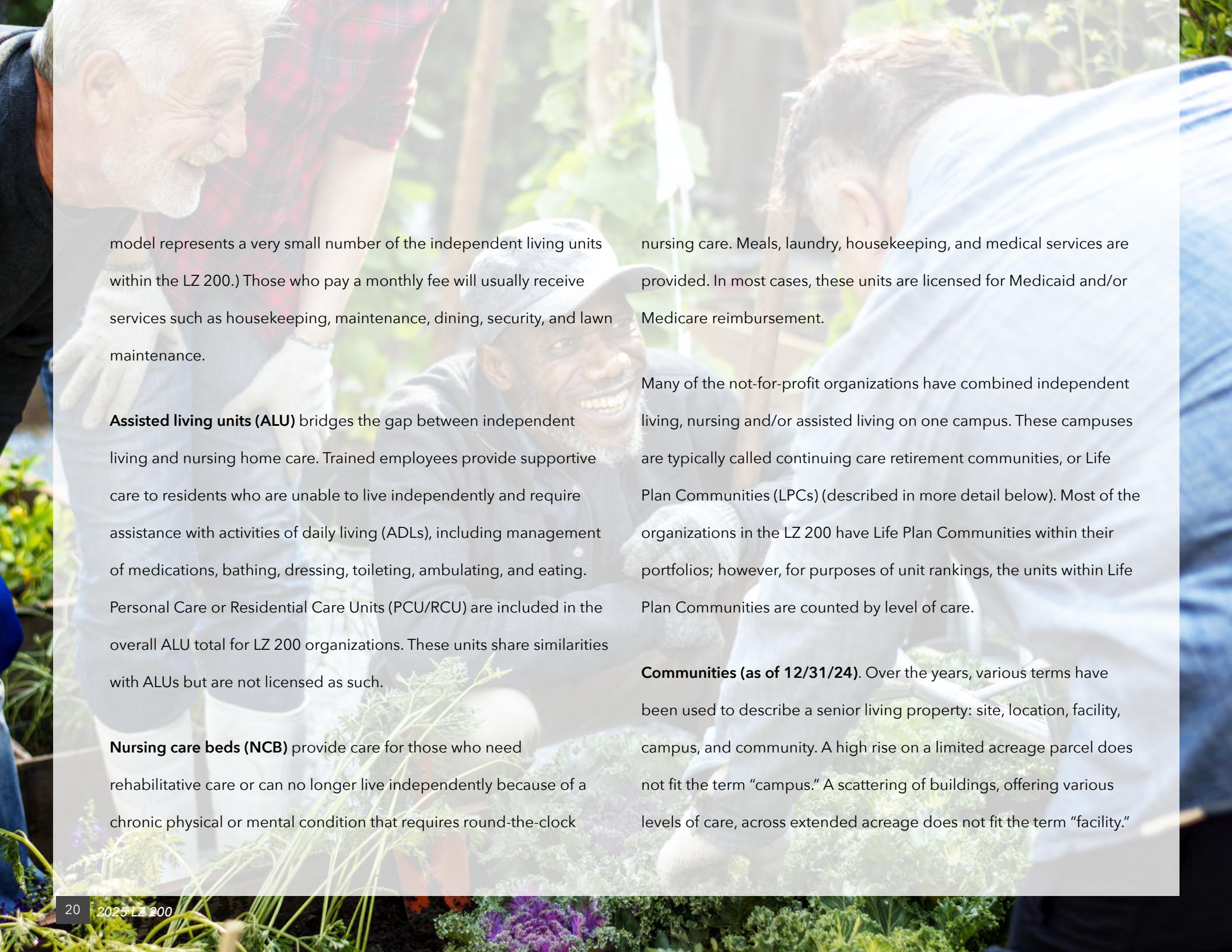
provides senior living in multiple states. The state shown for this organization is Illinois (IL), the location of its headquarters.

Units (as of 12/31/24). The systems listed in the 2025 LZ 200 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/24. Managed communities that are not owned are discussed later in the publication (*Chapter 4*) and are not included in the total community count compiled in the LZ 200 **Primary Ranking**. Government-subsidized (affordable housing) units are also excluded from this count but are presented for each of the LZ 200 organizations in subsequent listings (*Chapter 4*).

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

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





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

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

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

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

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

Communities (as of 12/31/24). Over the years, various terms have been used to describe a senior living property: site, location, facility, campus, and community. A high rise on a limited acreage parcel does not fit the term "campus." A scattering of buildings, offering various levels of care, across extended acreage does not fit the term "facility."

We believe the best all-encompassing word to use is "community." The communities examined are life plan communities (**LPC**), independent living communities (**IL**), assisted living communities (**AL**), and nursing homes (**NH**). It is important to note that a single Life Plan Community may include ILU (independent living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will contain at least independent living and nursing care². The Life Plan Community's resident payment plans may include entrance fee, condo/co-op, and/or rental programs. Generally, the majority of the Life Plan Community's units are not NCB. For communities listed as IL, AL or NH, these are communities whose primary unit mix is reflected by the name (e.g. IL community being predominantly Independent Living units.) In a

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

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

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

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

Ranked by Total Senior Living Units

2025 Rank	2024 Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Communities	DC	23,329	20,487	1,834	1,008	18	18	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	12,805	2,973	2,734	7,098	132	41	9	15	67
3	3	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	10,531	7,349	1,519	1,663	28	28	0	0	0
4	4	Presbyterian Homes & Services	MN	10,238	5,908	2,882	1,448	56	17	38	0	1
5	5	Ascension living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
6	6	HumanGood	CA	6,092	3,684	1,322	1,086	23	19	1	3	0
7	7	Covenant Living Communities and Services	IL	5,933	4,058	953	922	20	17	2	1	0
8	8	Lifespace Communities, Inc.	TX	5,374	3,652	685	1,037	16	16	0	0	0
9	9	Trinity Health Senior Communities	MI	5,039	1,989	1,112	1,938	35	4	11	4	16
10	10	Benedictine	MN	4,766	940	1,737	2,089	35	11	4	4	16
11	11	Front Porch Communities and Services	CA	4,346	3,521	171	654	16	16	0	0	0
12	12	Pacific Retirement Services	OR	4,224	2,987	763	474	12	12	0	0	0
13	13	Westminster Retirement Communities of Florida	FL	3,837	2,448	619	770	11	11	0	0	0
14	18 & 65	EverTrue fka Lutheran Senior Services & Diakon Lutheran Social Ministries	MO	3,806	2,422	1,008	376	13	12	0	1	0
15	14	Cassia	MN	3,707	88	2,233	1,386	46	0	2	27	17
16	19	Concordia Lutheran Ministries	PA	3,642	1,137	1,761	744	18	7	0	9	2
17	17	Otterbein SeniorLife	OH	3,608	1,627	643	1,338	20	11	0	0	9
18	15	Presbyterian Senior Living	PA	3,448	2,025	624	799	16	11	4	1	0
19	26	Transforming Age	WA	3,262	1,971	1,153	138	19	4	6	9	0
20	20	BHI Senior Living, Inc.	IN	3,236	1,431	1,121	684	10	10	0	0	0
21	16	Asbury Communities, Inc.	MD	3,007	2,037	528	442	9	5	2	2	0
22	22	Ecumen	MN	2,601	513	1,709	379	26	6	3	17	0
23	21	The Carmelite System	NY	2,589	231	355	2,003	13	6	1	1	5
24	23	Springpoint Senior Living, Inc.	NJ	2,578	1,709	378	491	10	8	0	1	1
25	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,532	1,615	233	684	5	3	1	0	1

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

Ranked by Total Senior Living Units

2025 Rank	2024 Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	24	Ohio Living Communities	OH	2,510	1,601	435	474	11	9	0	0	2
27	28	The Kendal Corporation	DE	2,421	1,817	329	275	10	7	1	1	1
28	29	Bethesda Senior Living Communities	CO	2,313	677	1,636	0	22	0	6	16	0
29	32	Presbyterian Manors of Mid-America, Inc.	KS	2,176	925	538	713	16	14	1	1	0
30	27	Volunteers of America	VA	2,146	604	820	722	9	3	1	3	2
31	31	National Church Residences	OH	2,141	1,278	716	147	15	3	3	9	0
32	30	Christian Care Companies	AZ	2,117	1,685	412	20	6	0	5	0	1
33	33	Willow Valley Communities	PA	2,102	1,651	220	231	3	3	0	0	0
34	34	Homewood Retirement Centers, Inc.	MD	1,941	1,180	310	451	5	4	1	0	0
35	41	Buckner Retirement Services	TX	1,904	1,202	406	296	7	7	0	0	0
36	35	Greencroft Communities	IN	1,875	696	578	601	9	7	0	2	0
37	68 & 145	Kintura fka Brightspire and Well-Spring Group	NC	1,867	1,340	252	275	5	5	0	0	0
38	57	Masonicare	CT	1,837	797	660	380	15	2	5	6	2
39	37	Lutheran Services Carolinas	NC	1,829	591	334	904	10	3	1	0	6
40	78 & 199	Eventide and Tabitha	MN	1,809	245	681	883	10	8	0	1	1
41	36	ArchCare	NY	1,782	0	59	1,723	7	0	0	1	6
42	38	Baptist Village Communities	OK	1,722	1,116	288	318	12	3	8	1	0
43	40	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
44	42	Loretto	NY	1,684	210	551	923	9	1	2	4	2
45	44	Franciscan Communities, Inc.	IL	1,665	740	387	538	8	4	1	3	0
46	43	Life Enriching Communities	OH	1,641	921	392	328	6	6	0	0	0
47	45	United Church Homes, Inc.	OH	1,617	857	215	545	15	4	7	1	3
48	47	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	0	1
49	48	Immanuel	NE	1,546	982	402	162	10	9	1	0	0
50	56	Vivie fka KNWM (Knuite Nelson / Walker Methodist)	MN	1,540	647	773	120	17	0	6	9	2

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

Ranked by Total Senior Living Units

2025 Rank	2024 Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	46	St. Francis Health Services of Morris, Inc.	MN	1,499	78	613	808	32	0	6	12	14
52	39	Bethesda Health Group, Inc.	MO	1,491	761	78	652	12	0	7	2	3
53	49	Hebrew SeniorLife	MA	1,484	654	115	715	4	2	1	0	1
54	55	Presbyterian Villages of Michigan	MI	1,466	1,100	264	102	10	1	7	2	0
55	51	Mississippi Methodist Senior Services, Inc.	MS	1,460	786	354	320	12	2	7	1	2
56	83	FellowshipLIFE, Inc.	NJ	1,409	893	323	193	5	5	0	0	0
57	52	LifeSpire of Virginia	VA	1,401	894	298	209	5	4	1	0	0
58	54	Presbyterian Living fka Presbyterian Homes, Inc.	IL	1,396	818	237	341	4	3	1	0	0
59	98	Sun Health	AZ	1,381	1,000	194	187	4	4	0	0	0
60	53	Presbyterian SeniorCare Network	PA	1,371	487	378	506	10	3	1	4	2
61	91	EveryAge	NC	1,335	708	180	447	4	4	0	0	0
62	58	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
63	71	Phoebe Ministries	PA	1,303	496	262	545	4	4	0	0	0
64	NR	Friendship	VA	1,278	484	313	481	4	2	0	1	1
65	59	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
66	115	Presbyterian Homes of Georgia, Inc.	GA	1,239	755	149	335	6	2	3	0	1
67	64	Wesley Enhanced Living	PA	1,231	635	236	360	5	4	1	0	0
68	66	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	8	2	2	1	3
69	67	Holland Home	MI	1,227	765	303	159	2	2	0	0	0
70	69	American Baptist Homes of the Midwest	MN	1,204	374	252	578	7	5	0	0	2
71	70	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
72	73	Lutheran Homes of South Carolina Inc.	SC	1,186	453	358	375	5	5	0	0	0
73	60	Illuminus, Inc.	WI	1,181	252	448	481	9	1	2	2	4
74	72	Wesley	WA	1,154	795	251	108	4	0	4	0	0
75	74	Friendship Villages of St. Louis	MO	1,153	783	136	234	2	2	0	0	0

NR: Not Ranked in that year

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

Ranked by Total Senior Living Units

2025 Rank	2024 Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	106	Mather	IL	1,141	1,005	59	77	4	3	1	0	0
77	76	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
78	114	Community Wellness Partners	NY	1,138	124	298	716	4	0	1	1	2
79	107	Garden Spot Communities	PA	1,130	786	193	151	3	2	0	0	1
80	75	Eskaton	CA	1,130	492	543	95	8	1	1	6	0
81	79	Ingleside	MD	1,124	834	157	133	3	3	0	0	0
82	62	Baruch Senior Ministries	MI	1,114	6	1,108	0	32	0	0	32	0
83	77	United Methodist Homes	NY	1,080	435	219	426	4	3	0	1	0
84	85	Brio Living Services	MI	1,073	664	265	144	6	2	3	1	0
85	89	Pinnacle Living	VA	1,061	544	374	143	6	4	0	2	0
86	81	Lutheran SeniorLife	PA	1,042	524	215	303	11	2	8	0	1
87	63	Saint Therese	MN	1,041	526	287	228	6	5	0	1	0
88	82	The United Methodist Retirement Homes, Inc.	NC	1,024	690	140	194	3	3	0	0	0
89	80	Sequoia Living, Inc.	CA	1,013	799	126	88	4	4	0	0	0
90	141	Felician Services Inc.	IL	1,006	313	288	405	7	2	1	1	3
91	84	Goodwin Living	VA	1,003	596	234	173	3	2	1	0	0
92	NR	Tandem Living fka Mennonite Home Communities	PA	997	752	85	160	2	2	0	0	0
93	86	Presbyterian Communities of South Carolina	SC	987	422	307	258	6	6	0	0	0
94	88	Providence Life Services	IL	986	614	255	117	4	1	2	0	1
95	90	The RiverWoods Group	NH	985	699	187	99	3	3	0	0	0
96	87	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
97	94	Givens Communities	NC	950	792	43	115	2	2	0	0	0
98	93	Lutheran Life Communities	IL	949	233	213	503	4	3	0	0	1
99	108	Vista Prairie Communities	MN	939	100	839	0	12	0	1	11	0
100	95	Christian Living Communities	CO	934	433	309	192	6	3	0	3	0

NR: Not Ranked in that year

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

Ranked by Total Senior Living Units

2025 Rank	2024 Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	61	National Lutheran Communities and Services	MD	932	546	206	180	3	2	0	1	0
102	96	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
103	97	St. John's Healthcare Corp	NY	916	403	38	475	4	0	1	1	2
104	126	Christian Health Care Center	NJ	913	514	95	304	8	2	4	1	1
105	92	Blue Skies of Texas	TX	908	699	129	80	2	2	0	0	0
106	103	Moorings Park	FL	898	683	109	106	3	1	2	0	0
107	99	Alliance Health & Human Services	MA	893	0	77	816	8	0	0	0	8
108	101	Menno Haven, Inc.	PA	880	497	223	160	2	2	0	0	0
109	104	Landis Communities	PA	876	614	159	103	4	1	2	1	0
110	102	United Methodist Communities	NJ	872	88	537	247	4	1	0	3	0
111	117	Wesley Willows	IL	859	566	202	91	3	1	1	1	0
112	109	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
113	NR	Forefront Living	TX	837	548	201	88	2	2	0	0	0
114	111	Living Branches	PA	834	459	232	143	3	2	0	1	0
115	112	Lutheran Social Ministries of Maryland	MD	827	622	90	115	2	2	0	0	0
116	116	Ascentria Care Alliance	MA	808	45	90	673	5	0	0	0	5
117	118	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
118	119	Heritage Pointe Communities	IN	785	187	255	343	3	3	0	0	0
119	120	Westminster-Canterbury on Chesapeake Bay	VA	783	595	80	108	2	1	1	0	0
120	122	St. Ann's Community	NY	769	246	75	448	5	0	2	1	2
121	123	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
122	124	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
123	125	Sunnyside Communities	VA	756	478	151	127	3	3	0	0	0
124	NR	Unitas Communities fka Morningstar Living / Moravian Manor Comm.	PA	753	470	137	146	2	2	0	0	0
125	138	Messiah Lifeways	PA	753	455	163	135	2	1	1	0	0

NR: Not Ranked in that year

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

Ranked by Total Senior Living Units

2025 Rank	2024 Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	135	Episcopal Seniorlife Communities	NY	752	407	193	152	10	0	6	3	1
127	128	Ohio Masonic Communities	OH	734	351	249	134	3	2	0	1	0
128	127	Futura Age	WA	733	221	114	398	2	1	0	0	1
129	129	Simpson Senior Services	PA	727	496	149	82	3	3	0	0	0
130	130	Bethany Lutheran Homes Inc	WI	726	282	321	123	10	2	1	6	1
131	131	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
132	105	Masonic Homes of Kentucky, Inc	KY	714	449	129	136	6	2	2	1	1
133	110	Christian Care Communities	KY	713	262	154	297	9	4	3	2	0
134	140	Benevolent Corporation Cedar Community	WI	706	412	219	75	8	1	3	3	1
135	133	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	3	3	0	0	0
136	132	Sunset Manor, Inc.	MI	697	385	312	0	4	0	2	2	0
137	134	Ebenezer Society	MN	696	0	443	253	10	0	0	6	4
138	172	Baptist Homes & Healthcare Ministries	MO	680	168	119	393	7	3	1	1	2
139	113	Luthercare	PA	678	482	110	86	2	1	1	0	0
140	136	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
141	137	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
142	139	Lutheran Life Villages	IN	672	183	164	325	6	2	0	2	2
143	163	Community First Solutions	OH	657	220	309	128	5	2	0	2	1
144	142	Friends Homes, Inc.	NC	646	445	92	109	2	2	0	0	0
145	143	Rockwood Retirement Communities	WA	638	445	148	45	2	2	0	0	0
146	144	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
147	146	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
148	169	Eliza Jennings Senior Care Network	OH	628	176	207	245	4	2	0	1	1
149	147	Morningside Ministries	TX	625	395	90	140	3	2	1	0	0
150	148	ThriveMore	NC	594	357	136	101	4	3	0	1	0

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

Ranked by Total Senior Living Units

2025 Rank	2024 Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	149	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
152	NR	Brethren Retirement Community	OH	587	228	199	160	3	2	1	0	0
153	150	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
154	152	Episcopal Communities & Services for Seniors	CA	563	443	120	0	4	3	0	1	0
155	151	Bethel	NY	563	170	130	263	5	1	1	1	2
156	153	The Legacy Senior Communities	TX	557	298	145	114	2	2	0	0	0
157	154	Cardinal Ritter Senior Services	MO	557	205	122	230	3	0	1	1	1
158	155	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
159	207	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
160	200	Silverstone Living	NH	550	286	139	125	3	2	0	1	0
161	156	Ararat Home of Los Angeles	CA	550	73	153	324	3	1	0	0	2
162	159	Bluestem Communities	KS	549	325	61	163	2	2	0	0	0
163	157	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
164	162	Redstone Presbyterian SeniorCare	PA	535	307	151	77	3	1	2	0	0
165	165	Episcopal Retirement Services	OH	522	309	75	138	3	3	0	0	0
166	166	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
167	167	Willow Brook Christian Communities	OH	518	267	167	84	3	1	1	0	1
168	168	CRISTA Senior Living	WA	517	374	143	0	2	0	1	1	0
169	160	Medford Leas	NJ	514	395	105	14	2	1	1	0	0
170	158	St. John's United	MT	505	203	201	101	5	4	0	1	0
171	171	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
172	173	The Village of St. Edward	OH	492	126	285	81	3	1	0	2	0
173	181	Convivial Life, Inc.	FL	488	307	181	0	2	1	0	1	0
174	174	St. Paul's Senior Services	CA	484	243	182	59	4	0	2	1	1
175	175	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2

NR: Not Ranked in that year

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

Ranked by Total Senior Living Units

2025 Rank	2024 Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	176	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
177	178	The Loomis Communities, Inc.	MA	468	368	58	42	4	0	1	2	1
178	177	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
179	202	Resthaven	MI	466	183	138	145	4	3	0	1	0
180	208	Taylor Community	NH	457	310	147	0	4	2	2	0	0
181	179	Baptist Senior Family	PA	451	326	62	63	2	1	1	0	0
182	NR	Guardian Angels Senior Services	MN	451	36	295	120	5	0	1	3	1
183	180	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
184	184	Bethesda	MN	430	89	93	248	3	1	1	1	0
185	183	Allegheny Lutheran Social Ministries	PA	428	173	103	152	3	3	0	0	0
186	185	Good Shepherd Communities	NY	427	194	67	166	3	2	0	0	1
187	182	Lutheran Home & Harwood Place	WI	427	169	98	160	2	0	1	0	1
188	187	Skaalen Retirement Services	WI	421	229	101	91	2	1	1	0	0
189	188	Wesbury UMC	PA	418	117	91	210	2	1	1	0	0
190	189	A.G. Rhodes	GA	416	0	0	416	3	0	0	0	3
191	192	Jewish Senior Life of Metropolitain of Detroit	MI	415	294	121	0	4	0	2	2	0
192	186	Parker Health Group	NJ	407	0	60	347	5	0	0	1	4
193	190	Beechwood Continuing Care, Inc.	NY	406	186	0	220	3	0	2	0	1
194	191	CJE SeniorLife	IL	405	240	165	0	3	1	1	1	0
195	NR	Oaknoll	IA	397	301	38	58	3	1	2	0	0
196	195	Canterbury Woods	NY	394	296	48	50	2	2	0	0	0
197	193	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	2	2	0	0	0
198	194	Trinity Senior Services fka Milwaukee Catholic Home	WI	386	205	74	107	2	1	1	0	0
199	NR	Pleasant View Communities	PA	380	229	59	92	2	1	1	0	0
200	161	HutsonWood	TN	371	0	72	299	4	0	0	0	4

NR: Not Ranked in that year

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

Ranked by Independent Living Units

2025 IL Rank	2024 IL Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Communities	DC	23,329	20,487	1,834	1,008	18	18	0	0	0
2	2	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	10,531	7,349	1,519	1,663	28	28	0	0	0
3	3	Presbyterian Homes & Services	MN	10,238	5,908	2,882	1,448	56	17	38	0	1
4	6	Covenant Living Communities and Services	IL	5,933	4,058	953	922	20	17	2	1	0
5	7	HumanGood	CA	6,092	3,684	1,322	1,086	23	19	1	3	0
6	4	Lifespace Communities, Inc.	TX	5,374	3,652	685	1,037	16	16	0	0	0
7	8	Front Porch Communities and Services	CA	4,346	3,521	171	654	16	16	0	0	0
8	9	Pacific Retirement Services	OR	4,224	2,987	763	474	12	12	0	0	0
9	5	The Evangelical Lutheran Good Samaritan Society	SD	12,805	2,973	2,734	7,098	132	41	9	15	67
10	10	Westminster Retirement Communities of Florida	FL	3,837	2,448	619	770	11	11	0	0	0
11	17 & 65	EverTrue fka Lutheran Senior Services & Diakon Lutheran Social Ministries	MO	3,806	2,422	1,008	376	13	12	0	1	0
12	11	Asbury Communities, Inc.	MD	3,007	2,037	528	442	9	5	2	2	0
13	12	Presbyterian Senior Living	PA	3,448	2,025	624	799	16	11	4	1	0
14	13	Trinity Health Senior Communities	MI	5,039	1,989	1,112	1,938	35	4	11	4	16
15	14	Transforming Age	WA	3,262	1,971	1,153	138	19	4	6	9	0
16	16	The Kendal Corporation	DE	2,421	1,817	329	275	10	7	1	1	1
17	15	Ascension living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
18	18	Springpoint Senior Living, Inc.	NJ	2,578	1,709	378	491	10	8	0	1	1
19	19	Christian Care Companies	AZ	2,117	1,685	412	20	6	0	5	0	1
20	20	Willow Valley Communities	PA	2,102	1,651	220	231	3	3	0	0	0
21	26	Otterbein SeniorLife	OH	3,608	1,627	643	1,338	20	11	0	0	9
22	21	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,532	1,615	233	684	5	3	1	0	1
23	22	Ohio Living Communities	OH	2,510	1,601	435	474	11	9	0	0	2
24	24	BHI Senior Living, Inc.	IN	3,236	1,431	1,121	684	10	10	0	0	0
25	35 & 94	Kintura fka Brightspire and Well-Spring Group	NC	1,867	1,340	252	275	5	5	0	0	0

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

Ranked by Independent Living Units

2025 IL Rank	2024 IL Rank	System Name	State	Total	Units (as of 12/31/24)				Communities (as of 12/31/24)			
					ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	23	National Church Residences	OH	2,141	1,278	716	147	15	3	3	9	0
27	29	Buckner Retirement Services	TX	1,904	1,202	406	296	7	7	0	0	0
28	25	Homewood Retirement Centers, Inc.	MD	1,941	1,180	310	451	5	4	1	0	0
29	28	Concordia Lutheran Ministries	PA	3,642	1,137	1,761	744	18	7	0	9	2
30	27	Baptist Village Communities	OK	1,722	1,116	288	318	12	3	8	1	0
31	30	Presbyterian Villages of Michigan	MI	1,466	1,100	264	102	10	1	7	2	0
32	51	Mather	IL	1,141	1,005	59	77	4	3	1	0	0
33	56	Sun Health	AZ	1,381	1,000	194	187	4	4	0	0	0
34	31	Immanuel	NE	1,546	982	402	162	10	9	1	0	0
35	32	Benedictine	MN	4,766	940	1,737	2,089	35	11	4	4	16
36	38	Presbyterian Manors of Mid-America, Inc.	KS	2,176	925	538	713	16	14	1	1	0
37	33	Life Enriching Communities	OH	1,641	921	392	328	6	6	0	0	0
38	36	LifeSpire of Virginia	VA	1,401	894	298	209	5	4	1	0	0
39	66	FellowshipLIFE, Inc.	NJ	1,409	893	323	193	5	5	0	0	0
40	34	United Church Homes, Inc.	OH	1,617	857	215	545	15	4	7	1	3
41	39	Ingleside	MD	1,124	834	157	133	3	3	0	0	0
42	40	Presbyterian Living fka Presbyterian Homes, Inc.	IL	1,396	818	237	341	4	3	1	0	0
43	37	Sequoia Living, Inc.	CA	1,013	799	126	88	4	4	0	0	0
44	41	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	0	1
45	60	Masonicare	CT	1,837	797	660	380	15	2	5	6	2
46	43	Wesley	WA	1,154	795	251	108	4	0	4	0	0
47	44	Givens Communities	NC	950	792	43	115	2	2	0	0	0
48	45	Mississippi Methodist Senior Services, Inc.	MS	1,460	786	354	320	12	2	7	1	2
49	64	Garden Spot Communities	PA	1,130	786	193	151	3	2	0	0	1
50	42	Friendship Villages of St. Louis	MO	1,153	783	136	234	2	2	0	0	0

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

Ranked by Independent Living Units

2025 IL Rank	2024 IL Rank	System Name	State	Total	Units (as of 12/31/24)				Communities (as of 12/31/24)			
					ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	47	Holland Home	MI	1,227	765	303	159	2	2	0	0	0
52	46	Bethesda Health Group, Inc.	MO	1,491	761	78	652	12	0	7	2	3
53	120	Presbyterian Homes of Georgia, Inc.	GA	1,239	755	149	335	6	2	3	0	1
54	NR	Tandem Living fka Mennonite Home Communities	PA	997	752	85	160	2	2	0	0	0
55	48	Franciscan Communities, Inc.	IL	1,665	740	387	538	8	4	1	3	0
56	78	EveryAge	NC	1,335	708	180	447	4	4	0	0	0
57	54	The RiverWoods Group	NH	985	699	187	99	3	3	0	0	0
58	49	Blue Skies of Texas	TX	908	699	129	80	2	2	0	0	0
59	52	Greencroft Communities	IN	1,875	696	578	601	9	7	0	2	0
60	53	The United Methodist Retirement Homes, Inc.	NC	1,024	690	140	194	3	3	0	0	0
61	58	Moorings Park	FL	898	683	109	106	3	1	2	0	0
62	70	Bethesda Senior Living Communities	CO	2,313	677	1,636	0	22	0	6	16	0
63	74	Brio Living Services	MI	1,073	664	265	144	6	2	3	1	0
64	59	Hebrew SeniorLife	MA	1,484	654	115	715	4	2	1	0	1
65	71	Vivie fka KNWM (Knuke Nelson / Walker Methodist)	MN	1,540	647	773	120	17	0	6	9	2
66	62	Wesley Enhanced Living	PA	1,231	635	236	360	5	4	1	0	0
67	63	Lutheran Social Ministries of Maryland	MD	827	622	90	115	2	2	0	0	0
68	61	Providence Life Services	IL	986	614	255	117	4	1	2	0	1
69	67	Landis Communities	PA	876	614	159	103	4	1	2	1	0
70	69	Volunteers of America	VA	2,146	604	820	722	9	3	1	3	2
71	50	Goodwin Living	VA	1,003	596	234	173	3	2	1	0	0
72	72	Westminster-Canterbury on Chesapeake Bay	VA	783	595	80	108	2	1	1	0	0
73	77	Lutheran Services Carolinas	NC	1,829	591	334	904	10	3	1	0	6
74	73	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	8	2	2	1	3
75	75	Wesley Willows	IL	859	566	202	91	3	1	1	1	0

NR: Not Ranked in that year

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

Ranked by Independent Living Units

2025 IL Rank	2024 IL Rank	System Name	State	Total	Units (as of 12/31/24)				Communities (as of 12/31/24)			
					ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	76	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
77	NR	Forefront Living	TX	837	548	201	88	2	2	0	0	0
78	55	National Lutheran Communities and Services	MD	932	546	206	180	3	2	0	1	0
79	79	Pinnacle Living	VA	1,061	544	374	143	6	4	0	2	0
80	80	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
81	57	Saint Therese	MN	1,041	526	287	228	6	5	0	1	0
82	81	Lutheran SeniorLife	PA	1,042	524	215	303	11	2	8	0	1
83	116	Christian Health Care Center	NJ	913	514	95	304	8	2	4	1	1
84	82	Ecumen	MN	2,601	513	1,709	379	26	6	3	17	0
85	83	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	3	3	0	0	0
86	85	Menno Haven, Inc.	PA	880	497	223	160	2	2	0	0	0
87	110	Phoebe Ministries	PA	1,303	496	262	545	4	4	0	0	0
88	90	Simpson Senior Services	PA	727	496	149	82	3	3	0	0	0
89	98	Eskaton	CA	1,130	492	543	95	8	1	1	6	0
90	86	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
91	84	Presbyterian SeniorCare Network	PA	1,371	487	378	506	10	3	1	4	2
92	NR	Friendship	VA	1,278	484	313	481	4	2	0	1	1
93	87	LutherCare	PA	678	482	110	86	2	1	1	0	0
94	88	Sunnyside Communities	VA	756	478	151	127	3	3	0	0	0
95	NR	Unitas Communities fka Morningstar Living / Moravian Manor Comm.	PA	753	470	137	146	2	2	0	0	0
96	89	Living Branches	PA	834	459	232	143	3	2	0	1	0
97	108	Messiah Lifeways	PA	753	455	163	135	2	1	1	0	0
98	100	Lutheran Homes of South Carolina Inc.	SC	1,186	453	358	375	5	5	0	0	0
99	91	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
100	92	Masonic Homes of Kentucky, Inc	KY	714	449	129	136	6	2	2	1	1

NR: Not Ranked in that year

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

Ranked by *Independent Living Units*

2025 IL Rank	2024 IL Rank	System Name	State	Total	Units (as of 12/31/24)				Communities (as of 12/31/24)			
					ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	93	Friends Homes, Inc.	NC	646	445	92	109	2	2	0	0	0
102	95	Rockwood Retirement Communities	WA	638	445	148	45	2	2	0	0	0
103	96	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
104	97	Episcopal Communities & Services for Seniors	CA	563	443	120	0	4	3	0	1	0
105	99	United Methodist Homes	NY	1,080	435	219	426	4	3	0	1	0
106	102	Christian Living Communities	CO	934	433	309	192	6	3	0	3	0
107	101	Presbyterian Communities of South Carolina	SC	987	422	307	258	6	6	0	0	0
108	104	Benevolent Corporation Cedar Community	WI	706	412	219	75	8	1	3	3	1
109	119	Episcopal Seniorlife Communities	NY	752	407	193	152	10	0	6	3	1
110	103	St. John's Healthcare Corp	NY	916	403	38	475	4	0	1	1	2
111	105	Morningside Ministries	TX	625	395	90	140	3	2	1	0	0
112	106	Medford Leas	NJ	514	395	105	14	2	1	1	0	0
113	107	Sunset Manor, Inc.	MI	697	385	312	0	4	0	2	2	0
114	113	American Baptist Homes of the Midwest	MN	1,204	374	252	578	7	5	0	0	2
115	109	CRISTA Senior Living	WA	517	374	143	0	2	0	1	1	0
116	114	The Loomis Communities, Inc.	MA	468	368	58	42	4	0	1	2	1
117	111	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
118	112	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
119	115	ThriveMore	NC	594	357	136	101	4	3	0	1	0
120	117	Ohio Masonic Communities	OH	734	351	249	134	3	2	0	1	0
121	121	Baptist Senior Family	PA	451	326	62	63	2	1	1	0	0
122	125	Bluestem Communities	KS	549	325	61	163	2	2	0	0	0
123	122	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
124	123	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
125	124	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0

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

Ranked by Independent Living Units

2025 IL Rank	2024 IL Rank	System Name	State	Total	Units (as of 12/31/24)				Communities (as of 12/31/24)			
					ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	170	Felician Services Inc.	IL	1,006	313	288	405	7	2	1	1	3
127	>200	Taylor Community	NH	457	310	147	0	4	2	2	0	0
128	126	Episcopal Retirement Services	OH	522	309	75	138	3	3	0	0	0
129	127	Redstone Presbyterian SeniorCare	PA	535	307	151	77	3	1	2	0	0
130	138	Convivial Life, Inc.	FL	488	307	181	0	2	1	0	1	0
131	NR	Oaknoll	IA	397	301	38	58	3	1	2	0	0
132	128	The Legacy Senior Communities	TX	557	298	145	114	2	2	0	0	0
133	129	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
134	130	Canterbury Woods	NY	394	296	48	50	2	2	0	0	0
135	131	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
136	132	Jewish Senior Life of Metropolitain of Detroit	MI	415	294	121	0	4	0	2	2	0
137	>200	Silverstone Living	NH	550	286	139	125	3	2	0	1	0
138	133	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
139	134	Bethany Lutheran Homes Inc	WI	726	282	321	123	10	2	1	6	1
140	135	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
141	136	Willow Brook Christian Communities	OH	518	267	167	84	3	1	1	0	1
142	137	Christian Care Communities	KY	713	262	154	297	9	4	3	2	0
143	139	Illuminus, Inc.	WI	1,181	252	448	481	9	1	2	2	4
144	140	St. Ann's Community	NY	769	246	75	448	5	0	2	1	2
145	177 & 200	Eventide and Tabitha	MN	1,809	245	681	883	10	8	0	1	1
146	141	St. Paul's Senior Services	CA	484	243	182	59	4	0	2	1	1
147	142	CJE SeniorLife	IL	405	240	165	0	3	1	1	1	0
148	143	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
149	144	Lutheran Life Communities	IL	949	233	213	503	4	3	0	0	1
150	145	The Carmelite System	NY	2,589	231	355	2,003	13	6	1	1	5

NR: Not Ranked in that year

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

Ranked by *Independent Living Units*

2025 IL Rank	2024 IL Rank	System Name	State	Total	Units (as of 12/31/24)				Communities (as of 12/31/24)			
					ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	147	Skaalen Retirement Services	WI	421	229	101	91	2	1	1	0	0
152	NR	Pleasant View Communities	PA	380	229	59	92	2	1	1	0	0
153	NR	Brethren Retirement Community	OH	587	228	199	160	3	2	1	0	0
154	148	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
155	149	Futura Age	WA	733	221	114	398	2	1	0	0	1
156	154	Community First Solutions	OH	657	220	309	128	5	2	0	2	1
157	150	Loretto	NY	1,684	210	551	923	9	1	2	4	2
158	152	Cardinal Ritter Senior Services	MO	557	205	122	230	3	0	1	1	1
159	151	Trinity Senior Services fka Milwaukee Catholic Home	WI	386	205	74	107	2	1	1	0	0
160	153	St. John's United	MT	505	203	201	101	5	4	0	1	0
161	156	Good Shepherd Communities	NY	427	194	67	166	3	2	0	0	1
162	157	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
163	159	Heritage Pointe Communities	IN	785	187	255	343	3	3	0	0	0
164	158	Beechwood Continuing Care, Inc.	NY	406	186	0	220	3	0	2	0	1
165	160	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
166	161	Lutheran Life Villages	IN	672	183	164	325	6	2	0	2	2
167	>200	Resthaven	MI	466	183	138	145	4	3	0	1	0
168	164	Eliza Jennings Senior Care Network	OH	628	176	207	245	4	2	0	1	1
169	162	Allegheny Lutheran Social Ministries	PA	428	173	103	152	3	3	0	0	0
170	166	Bethel	NY	563	170	130	263	5	1	1	1	2
171	167	Lutheran Home & Harwood Place	WI	427	169	98	160	2	0	1	0	1
172	173	Baptist Homes & Healthcare Ministries	MO	680	168	119	393	7	3	1	1	2
173	>200	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
174	171	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2
175	172	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	2	2	0	0	0

NR: Not Ranked in that year

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

Ranked by *Independent Living Units*

2025 IL Rank	2024 IL Rank	System Name	State	Total	Units (as of 12/31/24)				Communities (as of 12/31/24)			
					ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	163	The Village of St. Edward	OH	492	126	285	81	3	1	0	2	0
177	174	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
178	175	Community Wellness Partners	NY	1,138	124	298	716	4	0	1	1	2
179	176	Wesbury UMC	PA	418	117	91	210	2	1	1	0	0
180	179	Vista Prairie Communities	MN	939	100	839	0	12	0	1	11	0
181	180	Bethesda	MN	430	89	93	248	3	1	1	1	0
182	181	Cassia	MN	3,707	88	2,233	1,386	46	0	2	27	17
183	182	United Methodist Communities	NJ	872	88	537	247	4	1	0	3	0
184	183	St. Francis Health Services of Morris, Inc.	MN	1,499	78	613	808	32	0	6	12	14
185	185	Ararat Home of Los Angeles	CA	550	73	153	324	3	1	0	0	2
186	186	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
187	187	Ascentria Care Alliance	MA	808	45	90	673	5	0	0	0	5
188	188	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
189	189	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
190	NR	Guardian Angels Senior Services	MN	451	36	295	120	5	0	1	3	1
191	190	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
192	191	Baruch Senior Ministries	MI	1,114	6	1,108	0	32	0	0	32	0
193	192	ArchCare	NY	1,782	0	59	1,723	7	0	0	1	6
194	193	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
195	194	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
196	195	Alliance Health & Human Services	MA	893	0	77	816	8	0	0	0	8
197	196	Ebenezer Society	MN	696	0	443	253	10	0	0	6	4
198	199	A.G. Rhodes	GA	416	0	0	416	3	0	0	0	3
199	198	Parker Health Group	NJ	407	0	60	347	5	0	0	1	4
200	197	HutsonWood	TN	371	0	72	299	4	0	0	0	4

NR: Not Ranked in that year

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

Ranked by Total Assisted Living Units

2025 AL Rank	2024 AL Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	Presbyterian Homes & Services	MN	10,238	5,908	2,882	1,448	56	17	38	0	1
2	2	The Evangelical Lutheran Good Samaritan Society	SD	12,805	2,973	2,734	7,098	132	41	9	15	67
3	3	Cassia	MN	3,707	88	2,233	1,386	46	0	2	27	17
4	9	National Senior Communities	DC	23,329	20,487	1,834	1,008	18	18	0	0	0
5	8	Concordia Lutheran Ministries	PA	3,642	1,137	1,761	744	18	7	0	9	2
6	4	Benedictine	MN	4,766	940	1,737	2,089	35	11	4	4	16
7	5	Ecumen	MN	2,601	513	1,709	379	26	6	3	17	0
8	6	Bethesda Senior Living Communities	CO	2,313	677	1,636	0	22	0	6	16	0
9	7	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	10,531	7,349	1,519	1,663	28	28	0	0	0
10	12	HumanGood	CA	6,092	3,684	1,322	1,086	23	19	1	3	0
11	11	Ascension living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
12	23	Transforming Age	WA	3,262	1,971	1,153	138	19	4	6	9	0
13	14	BHI Senior Living, Inc.	IN	3,236	1,431	1,121	684	10	10	0	0	0
14	13	Trinity Health Senior Communities	MI	5,039	1,989	1,112	1,938	35	4	11	4	16
15	10	Baruch Senior Ministries	MI	1,114	6	1,108	0	32	0	0	32	0
16	20 & 93	EverTrue fka Lutheran Senior Services & Diakon Lutheran Social Ministries	MO	3,806	2,422	1,008	376	13	12	0	1	0
17	15	Covenant Living Communities and Services	IL	5,933	4,058	953	922	20	17	2	1	0
18	19	Vista Prairie Communities	MN	939	100	839	0	12	0	1	11	0
19	16	Volunteers of America	VA	2,146	604	820	722	9	3	1	3	2
20	25	Vivie fka KNWM (Knuite Nelson / Walker Methodist)	MN	1,540	647	773	120	17	0	6	9	2
21	17	Pacific Retirement Services	OR	4,224	2,987	763	474	12	12	0	0	0
22	21	National Church Residences	OH	2,141	1,278	716	147	15	3	3	9	0
23	18	Lifespace Communities, Inc.	TX	5,374	3,652	685	1,037	16	16	0	0	0
24	35 & 155	Eventide and Tabitha	MN	1,809	245	681	883	10	8	0	1	1
25	58	Masonicare	CT	1,837	797	660	380	15	2	5	6	2

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

Ranked by Total Assisted Living Units

2025 AL Rank	2024 AL Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	29	Otterbein SeniorLife	OH	3,608	1,627	643	1,338	20	11	0	0	9
27	24	Presbyterian Senior Living	PA	3,448	2,025	624	799	16	11	4	1	0
28	28	Westminster Retirement Communities of Florida	FL	3,837	2,448	619	770	11	11	0	0	0
29	26	St. Francis Health Services of Morris, Inc.	MN	1,499	78	613	808	32	0	6	12	14
30	30	Greencroft Communities	IN	1,875	696	578	601	9	7	0	2	0
31	32	Loretto	NY	1,684	210	551	923	9	1	2	4	2
32	27	Eskaton	CA	1,130	492	543	95	8	1	1	6	0
33	31	Presbyterian Manors of Mid-America, Inc.	KS	2,176	925	538	713	16	14	1	1	0
34	33	United Methodist Communities	NJ	872	88	537	247	4	1	0	3	0
35	22	Asbury Communities, Inc.	MD	3,007	2,037	528	442	9	5	2	2	0
36	36	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	0	1
37	34	Illuminus, Inc.	WI	1,181	252	448	481	9	1	2	2	4
38	37	Ebenezer Society	MN	696	0	443	253	10	0	0	6	4
39	38	Ohio Living Communities	OH	2,510	1,601	435	474	11	9	0	0	2
40	39	Christian Care Companies	AZ	2,117	1,685	412	20	6	0	5	0	1
41	51	Buckner Retirement Services	TX	1,904	1,202	406	296	7	7	0	0	0
42	41	Immanuel	NE	1,546	982	402	162	10	9	1	0	0
43	42	Life Enriching Communities	OH	1,641	921	392	328	6	6	0	0	0
44	43	Franciscan Communities, Inc.	IL	1,665	740	387	538	8	4	1	3	0
45	44	Springpoint Senior Living, Inc.	NJ	2,578	1,709	378	491	10	8	0	1	1
46	45	Presbyterian SeniorCare Network	PA	1,371	487	378	506	10	3	1	4	2
47	68	Pinnacle Living	VA	1,061	544	374	143	6	4	0	2	0
48	47	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
49	48	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
50	49	Lutheran Homes of South Carolina Inc.	SC	1,186	453	358	375	5	5	0	0	0

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

Ranked by Total Assisted Living Units

2025 AL Rank	2024 AL Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	46	The Carmelite System	NY	2,589	231	355	2,003	13	6	1	1	5
52	50	Mississippi Methodist Senior Services, Inc.	MS	1,460	786	354	320	12	2	7	1	2
53	52	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
54	56	Lutheran Services Carolinas	NC	1,829	591	334	904	10	3	1	0	6
55	40	The Kendal Corporation	DE	2,421	1,817	329	275	10	7	1	1	1
56	70	FellowshipLIFE, Inc.	NJ	1,409	893	323	193	5	5	0	0	0
57	53	Bethany Lutheran Homes Inc	WI	726	282	321	123	10	2	1	6	1
58	54	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
59	NR	Friendship	VA	1,278	484	313	481	4	2	0	1	1
60	57	Sunset Manor, Inc.	MI	697	385	312	0	4	0	2	2	0
61	61	Homewood Retirement Centers, Inc.	MD	1,941	1,180	310	451	5	4	1	0	0
62	60	Christian Living Communities	CO	934	433	309	192	6	3	0	3	0
63	91	Community First Solutions	OH	657	220	309	128	5	2	0	2	1
64	59	Presbyterian Communities of South Carolina	SC	987	422	307	258	6	6	0	0	0
65	62	Holland Home	MI	1,227	765	303	159	2	2	0	0	0
66	55	LifeSpire of Virginia	VA	1,401	894	298	209	5	4	1	0	0
67	103	Community Wellness Partners	NY	1,138	124	298	716	4	0	1	1	2
68	NR	Guardian Angels Senior Services	MN	451	36	295	120	5	0	1	3	1
69	63	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	8	2	2	1	3
70	64	Baptist Village Communities	OK	1,722	1,116	288	318	12	3	8	1	0
71	152	Felician Services Inc.	IL	1,006	313	288	405	7	2	1	1	3
72	81	Saint Therese	MN	1,041	526	287	228	6	5	0	1	0
73	66	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
74	80	The Village of St. Edward	OH	492	126	285	81	3	1	0	2	0
75	67	Brio Living Services	MI	1,073	664	265	144	6	2	3	1	0

NR: Not Ranked in that year

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

Ranked by Total Assisted Living Units

2025 AL Rank	2024 AL Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	74	Presbyterian Villages of Michigan	MI	1,466	1,100	264	102	10	1	7	2	0
77	69	Phoebe Ministries	PA	1,303	496	262	545	4	4	0	0	0
78	92	Providence Life Services	IL	986	614	255	117	4	1	2	0	1
79	76	Heritage Pointe Communities	IN	785	187	255	343	3	3	0	0	0
80	138 & 160	Kintura fka Brightspire and Well-Spring Group	NC	1,867	1,340	252	275	5	5	0	0	0
81	71	American Baptist Homes of the Midwest	MN	1,204	374	252	578	7	5	0	0	2
82	89	Wesley	WA	1,154	795	251	108	4	0	4	0	0
83	77	Ohio Masonic Communities	OH	734	351	249	134	3	2	0	1	0
84	78	Presbyterian Living fka Presbyterian Homes, Inc.	IL	1,396	818	237	341	4	3	1	0	0
85	79	Wesley Enhanced Living	PA	1,231	635	236	360	5	4	1	0	0
86	147	Goodwin Living	VA	1,003	596	234	173	3	2	1	0	0
87	75	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,532	1,615	233	684	5	3	1	0	1
88	82	Living Branches	PA	834	459	232	143	3	2	0	1	0
89	85	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
90	86	Menno Haven, Inc.	PA	880	497	223	160	2	2	0	0	0
91	87	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
92	88	Willow Valley Communities	PA	2,102	1,651	220	231	3	3	0	0	0
93	73	United Methodist Homes	NY	1,080	435	219	426	4	3	0	1	0
94	94	Benevolent Corporation Cedar Community	WI	706	412	219	75	8	1	3	3	1
95	106	United Church Homes, Inc.	OH	1,617	857	215	545	15	4	7	1	3
96	83	Lutheran SeniorLife	PA	1,042	524	215	303	11	2	8	0	1
97	84	Lutheran Life Communities	IL	949	233	213	503	4	3	0	0	1
98	151	Eliza Jennings Senior Care Network	OH	628	176	207	245	4	2	0	1	1
99	72	National Lutheran Communities and Services	MD	932	546	206	180	3	2	0	1	0
100	90	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1

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

Ranked by Total Assisted Living Units

2025 AL Rank	2024 AL Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	127	Wesley Willows	IL	859	566	202	91	3	1	1	1	0
102	NR	Forefront Living	TX	837	548	201	88	2	2	0	0	0
103	97	St. John's United	MT	505	203	201	101	5	4	0	1	0
104	NR	Brethren Retirement Community	OH	587	228	199	160	3	2	1	0	0
105	148	Sun Health	AZ	1,381	1,000	194	187	4	4	0	0	0
106	156	Garden Spot Communities	PA	1,130	786	193	151	3	2	0	0	1
107	95	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
108	96	Episcopal Seniorlife Communities	NY	752	407	193	152	10	0	6	3	1
109	98	The RiverWoods Group	NH	985	699	187	99	3	3	0	0	0
110	99	St. Paul's Senior Services	CA	484	243	182	59	4	0	2	1	1
111	100	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
112	102	Convivial Life, Inc.	FL	488	307	181	0	2	1	0	1	0
113	168	EveryAge	NC	1,335	708	180	447	4	4	0	0	0
114	105	Front Porch Communities and Services	CA	4,346	3,521	171	654	16	16	0	0	0
115	108	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
116	109	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
117	110	Willow Brook Christian Communities	OH	518	267	167	84	3	1	1	0	1
118	111	CJE SeniorLife	IL	405	240	165	0	3	1	1	1	0
119	112	Lutheran Life Villages	IN	672	183	164	325	6	2	0	2	2
120	113	Messiah Lifeways	PA	753	455	163	135	2	1	1	0	0
121	118	Landis Communities	PA	876	614	159	103	4	1	2	1	0
122	114	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2
123	115	Ingleside	MD	1,124	834	157	133	3	3	0	0	0
124	117	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
125	119	Christian Care Communities	KY	713	262	154	297	9	4	3	2	0

NR: Not Ranked in that year

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

Ranked by Total Assisted Living Units

2025 AL Rank	2024 AL Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	120	Ararat Home of Los Angeles	CA	550	73	153	324	3	1	0	0	2
127	122	Sunnyside Communities	VA	756	478	151	127	3	3	0	0	0
128	123	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
129	121	Redstone Presbyterian SeniorCare	PA	535	307	151	77	3	1	2	0	0
130	125	Presbyterian Homes of Georgia, Inc.	GA	1,239	755	149	335	6	2	3	0	1
131	107	Simpson Senior Services	PA	727	496	149	82	3	3	0	0	0
132	126	Rockwood Retirement Communities	WA	638	445	148	45	2	2	0	0	0
133	>200	Taylor Community	NH	457	310	147	0	4	2	2	0	0
134	124	The Legacy Senior Communities	TX	557	298	145	114	2	2	0	0	0
135	128	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
136	129	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
137	130	CRISTA Senior Living	WA	517	374	143	0	2	0	1	1	0
138	>200	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
139	131	The United Methodist Retirement Homes, Inc.	NC	1,024	690	140	194	3	3	0	0	0
140	>200	Silverstone Living	NH	550	286	139	125	3	2	0	1	0
141	>200	Resthaven	MI	466	183	138	145	4	3	0	1	0
142	NR	Unitas Communities fka Morningstar Living / Moravian Manor Comm.	PA	753	470	137	146	2	2	0	0	0
143	132	Friendship Villages of St. Louis	MO	1,153	783	136	234	2	2	0	0	0
144	133	ThriveMore	NC	594	357	136	101	4	3	0	1	0
145	134	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
146	136	Bethel	NY	563	170	130	263	5	1	1	1	2
147	137	Blue Skies of Texas	TX	908	699	129	80	2	2	0	0	0
148	101	Masonic Homes of Kentucky, Inc	KY	714	449	129	136	6	2	2	1	1
149	142	Sequoia Living, Inc.	CA	1,013	799	126	88	4	4	0	0	0
150	141	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4

NR: Not Ranked in that year

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

Ranked by Total Assisted Living Units

2025 AL Rank	2024 AL Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	143	Cardinal Ritter Senior Services	MO	557	205	122	230	3	0	1	1	1
152	157	Jewish Senior Life of Metropolitain of Detroit	MI	415	294	121	0	4	0	2	2	0
153	144	Episcopal Communities & Services for Seniors	CA	563	443	120	0	4	3	0	1	0
154	135	Baptist Homes & Healthcare Ministries	MO	680	168	119	393	7	3	1	1	2
155	149	Hebrew SeniorLife	MA	1,484	654	115	715	4	2	1	0	1
156	150	Futura Age	WA	733	221	114	398	2	1	0	0	1
157	139	Luthercare	PA	678	482	110	86	2	1	1	0	0
158	153	Moorings Park	FL	898	683	109	106	3	1	2	0	0
159	154	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
160	145	Medford Leas	NJ	514	395	105	14	2	1	1	0	0
161	161	Allegheny Lutheran Social Ministries	PA	428	173	103	152	3	3	0	0	0
162	159	Skaalen Retirement Services	WI	421	229	101	91	2	1	1	0	0
163	158	Lutheran Home & Harwood Place	WI	427	169	98	160	2	0	1	0	1
164	162	Christian Health Care Center	NJ	913	514	95	304	8	2	4	1	1
165	163	Bethesda	MN	430	89	93	248	3	1	1	1	0
166	164	Friends Homes, Inc.	NC	646	445	92	109	2	2	0	0	0
167	165	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	3	3	0	0	0
168	166	Wesbury UMC	PA	418	117	91	210	2	1	1	0	0
169	167	Lutheran Social Ministries of Maryland	MD	827	622	90	115	2	2	0	0	0
170	169	Morningside Ministries	TX	625	395	90	140	3	2	1	0	0
171	170	Ascentria Care Alliance	MA	808	45	90	673	5	0	0	0	5
172	NR	Tandem Living fka Mennonite Home Communities	PA	997	752	85	160	2	2	0	0	0
173	171	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	2	2	0	0	0
174	172	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
175	173	Westminster-Canterbury on Chesapeake Bay	VA	783	595	80	108	2	1	1	0	0

NR: Not Ranked in that year

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

Ranked by Total Assisted Living Units

2025 AL Rank	2024 AL Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	176	Bethesda Health Group, Inc.	MO	1,491	761	78	652	12	0	7	2	3
177	178	Alliance Health & Human Services	MA	893	0	77	816	8	0	0	0	8
178	179	Episcopal Retirement Services	OH	522	309	75	138	3	3	0	0	0
179	180	St. Ann's Community	NY	769	246	75	448	5	0	2	1	2
180	181	Trinity Senior Services fka Milwaukee Catholic Home	WI	386	205	74	107	2	1	1	0	0
181	182	HutsonWood	TN	371	0	72	299	4	0	0	0	4
182	183	Good Shepherd Communities	NY	427	194	67	166	3	2	0	0	1
183	185	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
184	186	Baptist Senior Family	PA	451	326	62	63	2	1	1	0	0
185	187	Bluestem Communities	KS	549	325	61	163	2	2	0	0	0
186	175	Parker Health Group	NJ	407	0	60	347	5	0	0	1	4
187	188	Mather	IL	1,141	1,005	59	77	4	3	1	0	0
188	NR	Pleasant View Communities	PA	380	229	59	92	2	1	1	0	0
189	189	ArchCare	NY	1,782	0	59	1,723	7	0	0	1	6
190	191	The Loomis Communities, Inc.	MA	468	368	58	42	4	0	1	2	1
191	190	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
192	194	Canterbury Woods	NY	394	296	48	50	2	2	0	0	0
193	193	Givens Communities	NC	950	792	43	115	2	2	0	0	0
194	195	St. John's Healthcare Corp	NY	916	403	38	475	4	0	1	1	2
195	NR	Oaknoll	IA	397	301	38	58	3	1	2	0	0
196	196	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
197	197	Beechwood Continuing Care, Inc.	NY	406	186	0	220	3	0	2	0	1
198	198	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
199	199	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
200	200	A.G. Rhodes	GA	416	0	0	416	3	0	0	0	3

NR: Not Ranked in that year

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

Ranked by Nursing Care Beds

2025 NCB Rank	2024 NCB Rank	System Name	State	Units (as of 12/31/24)				Communities (as of 12/31/24)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	The Evangelical Lutheran Good Samaritan Society	SD	12,805	2,973	2,734	7,098	132	41	9	15	67
2	2	Ascension living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
3	4	Benedictine	MN	4,766	940	1,737	2,089	35	11	4	4	16
4	3	The Carmelite System	NY	2,589	231	355	2,003	13	6	1	1	5
5	5	Trinity Health Senior Communities	MI	5,039	1,989	1,112	1,938	35	4	11	4	16
6	6	ArchCare	NY	1,782	0	59	1,723	7	0	0	1	6
7	7	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	10,531	7,349	1,519	1,663	28	28	0	0	0
8	11	Presbyterian Homes & Services	MN	10,238	5,908	2,882	1,448	56	17	38	0	1
9	10	Cassia	MN	3,707	88	2,233	1,386	46	0	2	27	17
10	9	Otterbein SeniorLife	OH	3,608	1,627	643	1,338	20	11	0	0	9
11	12	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
12	13	HumanGood	CA	6,092	3,684	1,322	1,086	23	19	1	3	0
13	14	Lifespace Communities, Inc.	TX	5,374	3,652	685	1,037	16	16	0	0	0
14	8	National Senior Communities	DC	23,329	20,487	1,834	1,008	18	18	0	0	0
15	17	Loretto	NY	1,684	210	551	923	9	1	2	4	2
16	15	Covenant Living Communities and Services	IL	5,933	4,058	953	922	20	17	2	1	0
17	18	Lutheran Services Carolinas	NC	1,829	591	334	904	10	3	1	0	6
18	40 & 95	Eventide and Tabitha	MN	1,809	245	681	883	10	8	0	1	1
19	23	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
20	24	Alliance Health & Human Services	MA	893	0	77	816	8	0	0	0	8
21	25	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
22	21	St. Francis Health Services of Morris, Inc.	MN	1,499	78	613	808	32	0	6	12	14
23	19	Presbyterian Senior Living	PA	3,448	2,025	624	799	16	11	4	1	0
24	26	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
25	27	Westminster Retirement Communities of Florida	FL	3,837	2,448	619	770	11	11	0	0	0

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

Ranked by Nursing Care Beds

2025 NCB Rank	2024 NCB Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	29	Concordia Lutheran Ministries	PA	3,642	1,137	1,761	744	18	7	0	9	2
27	16	Volunteers of America	VA	2,146	604	820	722	9	3	1	3	2
28	49	Community Wellness Partners	NY	1,138	124	298	716	4	0	1	1	2
29	30	Hebrew SeniorLife	MA	1,484	654	115	715	4	2	1	0	1
30	31	Presbyterian Manors of Mid-America, Inc.	KS	2,176	925	538	713	16	14	1	1	0
31	32	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,532	1,615	233	684	5	3	1	0	1
32	43	BHI Senior Living, Inc.	IN	3,236	1,431	1,121	684	10	10	0	0	0
33	33	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
34	34	Ascentria Care Alliance	MA	808	45	90	673	5	0	0	0	5
35	35	Front Porch Communities and Services	CA	4,346	3,521	171	654	16	16	0	0	0
36	20	Bethesda Health Group, Inc.	MO	1,491	761	78	652	12	0	7	2	3
37	36	Greencroft Communities	IN	1,875	696	578	601	9	7	0	2	0
38	37	American Baptist Homes of the Midwest	MN	1,204	374	252	578	7	5	0	0	2
39	41	United Church Homes, Inc.	OH	1,617	857	215	545	15	4	7	1	3
40	45	Phoebe Ministries	PA	1,303	496	262	545	4	4	0	0	0
41	42	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
42	44	Franciscan Communities, Inc.	IL	1,665	740	387	538	8	4	1	3	0
43	47	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
44	48	Presbyterian SeniorCare Network	PA	1,371	487	378	506	10	3	1	4	2
45	52	Lutheran Life Communities	IL	949	233	213	503	4	3	0	0	1
46	51	Springpoint Senior Living, Inc.	NJ	2,578	1,709	378	491	10	8	0	1	1
47	NR	Friendship	VA	1,278	484	313	481	4	2	0	1	1
48	46	Illuminus, Inc.	WI	1,181	252	448	481	9	1	2	2	4
49	53	St. John's Healthcare Corp	NY	916	403	38	475	4	0	1	1	2
50	54	Pacific Retirement Services	OR	4,224	2,987	763	474	12	12	0	0	0

NR: Not Ranked in that year

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

Ranked by Nursing Care Beds

2025 NCB Rank	2024 NCB Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	39	Ohio Living Communities	OH	2,510	1,601	435	474	11	9	0	0	2
52	56	Homewood Retirement Centers, Inc.	MD	1,941	1,180	310	451	5	4	1	0	0
53	57	St. Ann's Community	NY	769	246	75	448	5	0	2	1	2
54	83	EveryAge	NC	1,335	708	180	447	4	4	0	0	0
55	38	Asbury Communities, Inc.	MD	3,007	2,037	528	442	9	5	2	2	0
56	58	United Methodist Homes	NY	1,080	435	219	426	4	3	0	1	0
57	60	A.G. Rhodes	GA	416	0	0	416	3	0	0	0	3
58	62	Felician Services Inc.	IL	1,006	313	288	405	7	2	1	1	3
59	63	Futura Age	WA	733	221	114	398	2	1	0	0	1
60	98	Baptist Homes & Healthcare Ministries	MO	680	168	119	393	7	3	1	1	2
61	67	Masonicare	CT	1,837	797	660	380	15	2	5	6	2
62	64	Ecumen	MN	2,601	513	1,709	379	26	6	3	17	0
63	28 & 61	EverTrue fka Lutheran Senior Services & Diakon Lutheran Social Ministries	MO	3,806	2,422	1,008	376	13	12	0	1	0
64	65	Lutheran Homes of South Carolina Inc.	SC	1,186	453	358	375	5	5	0	0	0
65	66	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
66	68	Wesley Enhanced Living	PA	1,231	635	236	360	5	4	1	0	0
67	70	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	8	2	2	1	3
68	71	Parker Health Group	NJ	407	0	60	347	5	0	0	1	4
69	73	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
70	74	Heritage Pointe Communities	IN	785	187	255	343	3	3	0	0	0
71	75	Presbyterian Living fka Presbyterian Homes, Inc.	IL	1,396	818	237	341	4	3	1	0	0
72	76	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
73	77	Presbyterian Homes of Georgia, Inc.	GA	1,239	755	149	335	6	2	3	0	1
74	69	Life Enriching Communities	OH	1,641	921	392	328	6	6	0	0	0
75	79	Lutheran Life Villages	IN	672	183	164	325	6	2	0	2	2

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

Ranked by Nursing Care Beds

2025 NCB Rank	2024 NCB Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	80	Ararat Home of Los Angeles	CA	550	73	153	324	3	1	0	0	2
77	81	Mississippi Methodist Senior Services, Inc.	MS	1,460	786	354	320	12	2	7	1	2
78	82	Baptist Village Communities	OK	1,722	1,116	288	318	12	3	8	1	0
79	85	Christian Health Care Center	NJ	913	514	95	304	8	2	4	1	1
80	86	Lutheran SeniorLife	PA	1,042	524	215	303	11	2	8	0	1
81	55	HutsonWood	TN	371	0	72	299	4	0	0	0	4
82	59	Christian Care Communities	KY	713	262	154	297	9	4	3	2	0
83	78	Buckner Retirement Services	TX	1,904	1,202	406	296	7	7	0	0	0
84	87	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	0	1
85	88	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
86	97	The Kendal Corporation	DE	2,421	1,817	329	275	10	7	1	1	1
87	115 & 172	Kintura fka Brightspire and Well-Spring Group	NC	1,867	1,340	252	275	5	5	0	0	0
88	89	Bethel	NY	563	170	130	263	5	1	1	1	2
89	91	Presbyterian Communities of South Carolina	SC	987	422	307	258	6	6	0	0	0
90	>200	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
91	92	Ebenezer Society	MN	696	0	443	253	10	0	0	6	4
92	93	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
93	94	Bethesda	MN	430	89	93	248	3	1	1	1	0
94	96	United Methodist Communities	NJ	872	88	537	247	4	1	0	3	0
95	107	Eliza Jennings Senior Care Network	OH	628	176	207	245	4	2	0	1	1
96	99	Friendship Villages of St. Louis	MO	1,153	783	136	234	2	2	0	0	0
97	101	Willow Valley Communities	PA	2,102	1,651	220	231	3	3	0	0	0
98	102	Cardinal Ritter Senior Services	MO	557	205	122	230	3	0	1	1	1
99	72	Saint Therese	MN	1,041	526	287	228	6	5	0	1	0
100	104	Beechwood Continuing Care, Inc.	NY	406	186	0	220	3	0	2	0	1

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

Ranked by Nursing Care Beds

2025 NCB Rank	2024 NCB Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	105	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
102	109	Wesbury UMC	PA	418	117	91	210	2	1	1	0	0
103	103	LifeSpire of Virginia	VA	1,401	894	298	209	5	4	1	0	0
104	111	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
105	112	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
106	113	The United Methodist Retirement Homes, Inc.	NC	1,024	690	140	194	3	3	0	0	0
107	145	FellowshipLIFE, Inc.	NJ	1,409	893	323	193	5	5	0	0	0
108	114	Christian Living Communities	CO	934	433	309	192	6	3	0	3	0
109	155	Sun Health	AZ	1,381	1,000	194	187	4	4	0	0	0
110	84	National Lutheran Communities and Services	MD	932	546	206	180	3	2	0	1	0
111	117	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2
112	118	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	2	2	0	0	0
113	119	Goodwin Living	VA	1,003	596	234	173	3	2	1	0	0
114	120	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
115	121	Good Shepherd Communities	NY	427	194	67	166	3	2	0	0	1
116	122	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
117	123	Bluestem Communities	KS	549	325	61	163	2	2	0	0	0
118	124	Immanuel	NE	1,546	982	402	162	10	9	1	0	0
119	NR	Tandem Living fka Mennonite Home Communities	PA	997	752	85	160	2	2	0	0	0
120	125	Menno Haven, Inc.	PA	880	497	223	160	2	2	0	0	0
121	NR	Brethren Retirement Community	OH	587	228	199	160	3	2	1	0	0
122	126	Lutheran Home & Harwood Place	WI	427	169	98	160	2	0	1	0	1
123	127	Holland Home	MI	1,227	765	303	159	2	2	0	0	0
124	128	Episcopal Seniorlife Communities	NY	752	407	193	152	10	0	6	3	1
125	130	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1

NR: Not Ranked in that year

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

Ranked by Nursing Care Beds

2025 NCB Rank	2024 NCB Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	131	Allegheny Lutheran Social Ministries	PA	428	173	103	152	3	3	0	0	0
127	153	Garden Spot Communities	PA	1,130	786	193	151	3	2	0	0	1
128	133	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
129	134	National Church Residences	OH	2,141	1,278	716	147	15	3	3	9	0
130	NR	Unitas Communities fka Morningstar Living / Moravian Manor Communities	PA	753	470	137	146	2	2	0	0	0
131	>200	Resthaven	MI	466	183	138	145	4	3	0	1	0
132	135	Brio Living Services	MI	1,073	664	265	144	6	2	3	1	0
133	129	Pinnacle Living	VA	1,061	544	374	143	6	4	0	2	0
134	136	Living Branches	PA	834	459	232	143	3	2	0	1	0
135	137	Morningside Ministries	TX	625	395	90	140	3	2	1	0	0
136	180	Transforming Age	WA	3,262	1,971	1,153	138	19	4	6	9	0
137	138	Episcopal Retirement Services	OH	522	309	75	138	3	3	0	0	0
138	139	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
139	141	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
140	100	Masonic Homes of Kentucky, Inc.	KY	714	449	129	136	6	2	2	1	1
141	144	Messiah Lifeways	PA	753	455	163	135	2	1	1	0	0
142	143	Ohio Masonic Communities	OH	734	351	249	134	3	2	0	1	0
143	149	Ingleside	MD	1,124	834	157	133	3	3	0	0	0
144	146	Community First Solutions	OH	657	220	309	128	5	2	0	2	1
145	147	Sunnyside Communities	VA	756	478	151	127	3	3	0	0	0
146	>200	Silverstone Living	NH	550	286	139	125	3	2	0	1	0
147	150	Bethany Lutheran Homes Inc	WI	726	282	321	123	10	2	1	6	1
148	151	Vivie fka KNWM (Knuite Nelson / Walker Methodist)	MN	1,540	647	773	120	17	0	6	9	2
149	152	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
150	NR	Guardian Angels Senior Services	MN	451	36	295	120	5	0	1	3	1

NR: Not Ranked in that year

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

Ranked by Nursing Care Beds

2025 NCB Rank	2024 NCB Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	140	Providence Life Services	IL	986	614	255	117	4	1	2	0	1
152	154	Givens Communities	NC	950	792	43	115	2	2	0	0	0
153	156	Lutheran Social Ministries of Maryland	MD	827	622	90	115	2	2	0	0	0
154	157	The Legacy Senior Communities	TX	557	298	145	114	2	2	0	0	0
155	158	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
156	159	Friends Homes, Inc.	NC	646	445	92	109	2	2	0	0	0
157	116	Wesley	WA	1,154	795	251	108	4	0	4	0	0
158	160	Westminster-Canterbury on Chesapeake Bay	VA	783	595	80	108	2	1	1	0	0
159	162	Trinity Senior Services fka Milwaukee Catholic Home	WI	386	205	74	107	2	1	1	0	0
160	163	Moorings Park	FL	898	683	109	106	3	1	2	0	0
161	164	Landis Communities	PA	876	614	159	103	4	1	2	1	0
162	165	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	3	3	0	0	0
163	166	Presbyterian Villages of Michigan	MI	1,466	1,100	264	102	10	1	7	2	0
164	168	ThriveMore	NC	594	357	136	101	4	3	0	1	0
165	132	St. John's United	MT	505	203	201	101	5	4	0	1	0
166	169	The RiverWoods Group	NH	985	699	187	99	3	3	0	0	0
167	171	Eskaton	CA	1,130	492	543	95	8	1	1	6	0
168	NR	Pleasant View Communities	PA	380	229	59	92	2	1	1	0	0
169	174	Wesley Willows	IL	859	566	202	91	3	1	1	1	0
170	175	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
171	176	Skaalen Retirement Services	WI	421	229	101	91	2	1	1	0	0
172	142	Sequoia Living, Inc.	CA	1,013	799	126	88	4	4	0	0	0
173	NR	Frontline Living	TX	837	548	201	88	2	2	0	0	0
174	108	LutherCare	PA	678	482	110	86	2	1	1	0	0
175	177	Willow Brook Christian Communities	OH	518	267	167	84	3	1	1	0	1

NR: Not Ranked in that year

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

Ranked by Nursing Care Beds

2025 NCB Rank	2024 NCB Rank	System Name	State	Units (as of 12/31/24)			Communities (as of 12/31/24)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	167	Simpson Senior Services	PA	727	496	149	82	3	3	0	0	0
177	178	The Village of St. Edward	OH	492	126	285	81	3	1	0	2	0
178	173	Blue Skies of Texas	TX	908	699	129	80	2	2	0	0	0
179	181	Mather	IL	1,141	1,005	59	77	4	3	1	0	0
180	182	Redstone Presbyterian SeniorCare	PA	535	307	151	77	3	1	2	0	0
181	183	Benevolent Corporation Cedar Community	WI	706	412	219	75	8	1	3	3	1
182	185	Baptist Senior Family	PA	451	326	62	63	2	1	1	0	0
183	186	St. Paul's Senior Services	CA	484	243	182	59	4	0	2	1	1
184	NR	Oaknoll	IA	397	301	38	58	3	1	2	0	0
185	187	Canterbury Woods	NY	394	296	48	50	2	2	0	0	0
186	188	Rockwood Retirement Communities	WA	638	445	148	45	2	2	0	0	0
187	190	The Loomis Communities, Inc.	MA	468	368	58	42	4	0	1	2	1
188	189	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
189	184	Christian Care Companies	AZ	2,117	1,685	412	20	6	0	5	0	1
190	191	Medford Leas	NJ	514	395	105	14	2	1	1	0	0
191	192	Bethesda Senior Living Communities	CO	2,313	677	1,636	0	22	0	6	16	0
192	196	Episcopal Communities & Services for Seniors	CA	563	443	120	0	4	3	0	1	0
193	195	Sunset Manor, Inc.	MI	697	385	312	0	4	0	2	2	0
194	197	CRISTA Senior Living	WA	517	374	143	0	2	0	1	1	0
195	>200	Taylor Community	NH	457	310	147	0	4	2	2	0	0
196	198	Convivial Life, Inc.	FL	488	307	181	0	2	1	0	1	0
197	200	Jewish Senior Life of Metropolitan of Detroit	MI	415	294	121	0	4	0	2	2	0
198	199	CJE SeniorLife	IL	405	240	165	0	3	1	1	1	0
199	194	Vista Prairie Communities	MN	939	100	839	0	12	0	1	11	0
200	193	Baruch Senior Ministries	MI	1,114	6	1,108	0	32	0	0	32	0

NR: Not Ranked in that year

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

The Over 200

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

The Over 200 are additional organizations that rank beyond the largest 200.

Over 200 (359 and fewer Total Units)

- Baptist Life Communities (KY)
- Bethany Life (IA)
- Catholic Eldercare (MN)
- Christian Community Homes and Services (WI)
- Crest View Senior Communities (MN)
- EHM Senior Solutions (MI)
- Evergreen Communities (WI)
- Genacross Lutheran Services (OH)
- Los Angeles Jewish Health (CA)
- Masonic Homes of California®
- Miravida Living (WI)

Over 200 (268 and fewer Total Units)

- Bethel Home & Services (WI)
- Christian Community Home of Osceola (FL)
- Grace Lutheran Communities (WI)
- Mennonite Home Communities (OH)
- Perry Lutheran Homes (IA)
- Saint Elizabeth Community (RI)
- The Lutheran Home Association (MN)
- Three Pillars Senior Living Communities (WI)
- Wesley Woods Senior Living (GA)
- Woodhaven Retirement Community (MI)

The Rankings: Change at a Glance

Greatest Changes in Units

Greatest Increase and Decrease	State	YE 2024 Units	YE 2023 Units	Change
Greatest Increase				
National Senior Campuses	DC	23,329	21,871	+1,458
Transforming Age	WA	3,262	2,542	+720
Eventide & Tabitha	MN	1,809	1,123	+686
Kintura fka Brightspire & Well-Spring Group	NC	1,867	1,215	+652
EverTrue fka Lutheran Senior Services & Diakon Lutheran Social Ministries	MO	3,806	3,213	+593
Greatest Decrease				
Asbury Communities	MD	3,007	3,484	-477
The Evangelical Lutheran Good Samaritan Society	SD	12,805	13,280	-475
Volunteers of America	VA	2,146	2,484	-338
Lifespace Communities	TX	5,374	5,604	-230
Bethesda Health Group	MO	1,491	1,701	-210

The Rankings: Change at a Glance

Greatest Changes in Rank

Greatest Upward and Downward Change	State	2025 Rank	2024 Rank	Change
Greatest Upward Movement				
Eventide & Tabitha	MN	39	78	+39
Sun Health	AZ	59	98	+39
Baptist Homes & Healthcare Ministries	MO	138	172	+34
Kintura fka Brightspire & Well-Spring Group	NC	36	68	+32
EveryAge	NC	61	91	+30
Greatest Downward Movement				
Masonic Homes of Kentucky	KY	132	105	-27
LutherCare	PA	139	113	-26
Saint Therese	MN	87	63	-24
Christian Care Communities	KY	133	110	-23
Baruch Senior Ministries	MI	82	62	-20



Chapter 4

Analysis of the Data

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

Units

The first analysis of the 2025 LZ 200 provides a side-by-side comparison of the unit mix for 2024 compared to 2023 for each of the organizations. The 2025 LZ 200 organizations own more than 300,000 market-rate senior living units. By breaking the data into the largest 10, 25, 50, 100 and 150 (Chart 4-1c), it is evident that the ratio of units held by the largest 50 compared with the percentage of total units in the LZ 200 is not balanced, e.g., the largest 50

systems hold slightly more than 60% of the total units. The 10 largest systems own 30% of the total LZ 200 units. The average system within the 2025 LZ 200 reported nearly 1,546 units in 2024 (Chart 4-1b). Nearly 45% of the 2025 LZ 200's total communities are Life Plan Communities, with the more than 55% evenly divided between stand-alone ILs, ALs, and NHs.

Summary of Not-for-Profit Units. These columns show the total number of units, followed by a breakdown of this total by level of care for each system. The first set of columns show the unit mix as of 12/31/24. The second set of columns show the unit mix as of 12/31/23.

Change in Total Units from 2023 to 2024. This column provides the change in the listed organization's TOTAL market-rate units (all levels of care) between year-end 2024 and year-end 2023.

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

percentage of total units is detailed in 4-1b as well as 4-1c. This section also examines the unit mix between each of the five years' LZ 200 listings. Chart 4-1d provides a more graphic illustration of the type of change occurring in the LZ 200. For all the year-over-year comparisons made in 4.1b-4.1e, note the increase to 200 as part of the 2014 through the 2025 publications. In some instances, two figures are calculated for the current publication, one that reflects the largest 100, 150 and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 200 listing.

Communities

The unit analysis presented in Chart 4-1a is followed by a side-by-side comparison in Chart 4-2a of the community portfolios of the 2025 LZ 200 for 2024 compared to their portfolios at the end of 2023.

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

subsidized (affordable) housing properties are excluded from the count of communities shown for the LZ 200 (these properties are examined in Chapter 4). The first set of columns in Chart 4-2a shows the communities owned, by type, as of 12/31/24. The second set of columns shows the communities owned, by type, as of 12/31/23.

Change in Total Communities from 2023 to 2024. This column provides the change in the listed organization's TOTAL communities (all types, excluding affordable housing) between year-end 2023 and year-end 2024. Chart 4-2b provides two examinations of three-year comparisons of the LZ 200 organizations. The first half of the chart examines the community holdings between each of the five years' LZ 200 listings. As with the year-over-year unit comparisons, in some instances, two figures are calculated for the current publication, one that reflects the largest 150 and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 200 listing.

Organizational Characteristics: Units

Rank Detailed by Units (2024 vs. 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2023 to 2024	
				2024 Units				2023 Units					
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB		
1	1	National Senior Communities	DC	23,329	20,487	1,834	1,008	21,871	19,026	1,305	1,540	1,458	
2	2	The Evangelical Lutheran Good Samaritan Society	SD	12,805	2,973	2,734	7,098	13,280	3,689	2,334	7,257	-475	
3	3	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	10,531	7,349	1,519	1,663	10,176	7,148	1,405	1,623	355	
4	4	Presbyterian Homes & Services	MN	10,238	5,908	2,882	1,448	10,006	5,704	2,927	1,375	232	
5	5	Ascension living	MO	6,692	1,800	1,203	3,689	6,692	1,800	1,203	3,689	0	
6	6	HumanGood	CA	6,092	3,684	1,322	1,086	5,882	3,614	1,180	1,088	210	
7	7	Covenant Living Communities and Services	IL	5,933	4,058	953	922	5,644	3,652	971	1,021	289	
8	8	Lifespace Communities, Inc.	TX	5,374	3,652	685	1,037	5,604	3,774	747	1,083	-230	
9	9	Trinity Health Senior Communities	MI	5,039	1,989	1,112	1,938	5,032	1,941	1,104	1,987	7	
10	10	Benedictine	MN	4,766	940	1,737	2,089	4,859	940	1,740	2,179	-93	
11	11	Front Porch Communities and Services	CA	4,346	3,521	171	654	4,346	3,521	171	654	0	
12	12	Pacific Retirement Services	OR	4,224	2,987	763	474	4,224	2,987	763	474	0	
13	13	Westminster Retirement Communities of Florida	FL	3,837	2,448	619	770	3,868	2,504	603	761	-31	
14	18 & 65	EverTrue fka Lutheran Senior Services & Diakon Lutheran Social Ministries	MO	3,806	2,422	1,008	376	3,213	1,729	723	761	593	
15	14	Cassia	MN	3,707	88	2,233	1,386	3,707	88	2,233	1,386	0	
16	19	Concordia Lutheran Ministries	PA	3,642	1,137	1,761	744	3,176	1,082	1,355	739	466	
17	17	Otterbein SeniorLife	OH	3,608	1,627	643	1,338	3,244	1,165	598	1,481	364	
18	15	Presbyterian Senior Living	PA	3,448	2,025	624	799	3,557	2,028	640	889	-109	
19	26	Transforming Age	WA	3,262	1,971	1,153	138	2,542	1,814	650	78	720	
20	20	BHI Senior Living, Inc.	IN	3,236	1,431	1,121	684	2,813	1,246	1,029	538	423	
21	16	Asbury Communities, Inc.	MD	3,007	2,037	528	442	3,484	2,225	694	565	-477	
22	22	Ecumen	MN	2,601	513	1,709	379	2,601	513	1,709	379	0	
23	21	The Carmelite System	NY	2,589	231	355	2,003	2,796	230	367	2,199	-207	
24	23	Springpoint Senior Living, Inc.	NJ	2,578	1,709	378	491	2,595	1,720	384	491	-17	
25	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,532	1,615	233	684	2,572	1,632	256	684	-40	

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2024 vs. 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2023 to 2024	
				2024 Units				2023 Units					
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB		
26	24	Ohio Living Communities	OH	2,510	1,601	435	474	2,593	1,602	434	557	-83	
27	28	The Kendal Corporation	DE	2,421	1,817	329	275	2,393	1,747	404	242	28	
28	29	Bethesda Senior Living Communities	CO	2,313	677	1,636	0	2,260	598	1,662	0	53	
29	32	Presbyterian Manors of Mid-America, Inc.	KS	2,176	925	538	713	2,115	844	552	719	61	
30	27	Volunteers of America	VA	2,146	604	820	722	2,484	604	873	1,007	-338	
31	31	National Church Residences	OH	2,141	1,278	716	147	2,141	1,278	716	147	0	
32	30	Christian Care Companies	AZ	2,117	1,685	412	20	2,165	1,685	412	68	-48	
33	33	Willow Valley Communities	PA	2,102	1,651	220	231	2,102	1,651	220	231	0	
34	34	Homewood Retirement Centers, Inc.	MD	1,941	1,180	310	451	1,935	1,181	303	451	6	
35	41	Buckner Retirement Services	TX	1,904	1,202	406	296	1,688	1,018	344	326	216	
36	35	Greencroft Communities	IN	1,875	696	578	601	1,875	696	578	601	0	
37	68 & 145	Kintura fka Brightspire and Well-Spring Group	NC	1,867	1,340	252	275	1,215	898	128	189	652	
38	57	Masonicare	CT	1,837	797	660	380	1,326	651	309	366	511	
39	37	Lutheran Services Carolinas	NC	1,829	591	334	904	1,771	552	315	904	58	
40	78 & 199	Eventide and Tabitha	MN	1,809	245	681	883	1,123	111	460	552	686	
41	36	ArchCare	NY	1,782	0	59	1,723	1,782	0	59	1,723	0	
42	38	Baptist Village Communities	OK	1,722	1,116	288	318	1,722	1,116	288	318	0	
43	40	Covenant Health	MA	1,696	0	364	1,332	1,696	0	364	1,332	0	
44	42	Loretto	NY	1,684	210	551	923	1,684	210	551	923	0	
45	44	Franciscan Communities, Inc.	IL	1,665	740	387	538	1,665	740	387	538	0	
46	43	Life Enriching Communities	OH	1,641	921	392	328	1,666	909	399	358	-25	
47	45	United Church Homes, Inc.	OH	1,617	857	215	545	1,623	908	170	545	-6	
48	47	Methodist Retirement Communities	TX	1,549	798	457	294	1,549	798	457	294	0	
49	48	Immanuel	NE	1,546	982	402	162	1,546	982	402	162	0	
50	56	Vivie fka KNWM (Knute Nelson / Walker Methodist)	MN	1,540	647	773	120	1,346	596	630	120	194	

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2024 vs. 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2023 to 2024	
				2024 Units				2023 Units					
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB		
51	46	St. Francis Health Services of Morris, Inc.	MN	1,499	78	613	808	1,568	78	630	860	-69	
52	39	Bethesda Health Group, Inc.	MO	1,491	761	78	652	1,701	761	78	862	-210	
53	49	Hebrew SeniorLife	MA	1,484	654	115	715	1,489	654	114	721	-5	
54	55	Presbyterian Villages of Michigan	MI	1,466	1,100	264	102	1,366	1,000	264	102	100	
55	51	Mississippi Methodist Senior Services, Inc.	MS	1,460	786	354	320	1,445	773	352	320	15	
56	83	FellowshipLIFE, Inc.	NJ	1,409	893	323	193	1,018	611	274	133	391	
57	52	LifeSpire of Virginia	VA	1,401	894	298	209	1,435	894	315	226	-34	
58	54	Presbyterian Living fka Presbyterian Homes, Inc.	IL	1,396	818	237	341	1,397	819	237	341	-1	
59	98	Sun Health	AZ	1,381	1,000	194	187	896	667	114	115	485	
60	53	Presbyterian SeniorCare Network	PA	1,371	487	378	506	1,398	500	379	519	-27	
61	91	EveryAge	NC	1,335	708	180	447	956	548	90	318	379	
62	58	Magnolia Manor, Inc.	GA	1,307	294	170	843	1,307	294	170	843	0	
63	71	Phoebe Ministries	PA	1,303	496	262	545	1,179	370	275	534	124	
64	NR	Friendship	VA	1,278	484	313	481	1,278	484	313	481	0	
65	59	Heritage Ministries	NY	1,268	363	221	684	1,268	363	221	684	0	
66	115	Presbyterian Homes of Georgia, Inc.	GA	1,239	755	149	335	814	330	149	335	425	
67	64	Wesley Enhanced Living	PA	1,231	635	236	360	1,231	635	236	360	0	
68	66	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	1,230	580	292	358	0	
69	67	Holland Home	MI	1,227	765	303	159	1,221	759	303	159	6	
70	69	American Baptist Homes of the Midwest	MN	1,204	374	252	578	1,209	359	272	578	-5	
71	70	SpiriTrust Lutheran	PA	1,187	557	286	344	1,187	557	286	344	0	
72	73	Lutheran Homes of South Carolina Inc.	SC	1,186	453	358	375	1,168	435	358	375	18	
73	60	Illuminus, Inc.	WI	1,181	252	448	481	1,267	256	480	531	-86	
74	72	Wesley	WA	1,154	795	251	108	1,174	776	214	184	-20	
75	74	Friendship Villages of St. Louis	MO	1,153	783	136	234	1,153	783	136	234	0	

NR: Not Ranked in that year

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2024 vs. 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2023 to 2024	
				2024 Units				2023 Units					
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB		
76	106	Mather	IL	1,141	1,005	59	77	848	712	59	77	293	
77	76	Legacy Lifecare	MA	1,141	0	361	780	1,141	0	361	780	0	
78	114	Community Wellness Partners	NY	1,138	124	298	716	818	124	178	516	320	
79	107	Garden Spot Communities	PA	1,130	786	193	151	845	621	105	119	285	
80	75	Eskaton	CA	1,130	492	543	95	1,142	442	605	95	-12	
81	79	Ingleside	MD	1,124	834	157	133	1,113	833	157	123	11	
82	62	Baruch Senior Ministries	MI	1,114	6	1,108	0	1,260	6	1,254	0	-146	
83	77	United Methodist Homes	NY	1,080	435	219	426	1,128	436	266	426	-48	
84	85	Brio Living Services	MI	1,073	664	265	144	999	572	283	144	74	
85	89	Pinnacle Living	VA	1,061	544	374	143	973	544	277	152	88	
86	81	Lutheran SeniorLife	PA	1,042	524	215	303	1,058	524	231	303	-16	
87	63	Saint Therese	MN	1,041	526	287	228	1,244	666	232	346	-203	
88	82	The United Methodist Retirement Homes, Inc.	NC	1,024	690	140	194	1,025	691	140	194	-1	
89	80	Sequoia Living, Inc.	CA	1,013	799	126	88	1,108	849	123	136	-95	
90	141	Felician Services Inc.	IL	1,006	313	288	405	657	141	108	408	349	
91	84	Goodwin Living	VA	1,003	596	234	173	1,010	721	118	171	-7	
92	NR	Tandem Living fka Mennonite Home Communities	PA	997	752	85	160	997	752	85	160	0	
93	86	Presbyterian Communities of South Carolina	SC	987	422	307	258	987	425	307	255	0	
94	88	Providence Life Services	IL	986	614	255	117	973	638	198	137	13	
95	90	The RiverWoods Group	NH	985	699	187	99	967	681	187	99	18	
96	87	Liberty Lutheran Services	PA	978	443	318	217	978	443	318	217	0	
97	94	Givens Communities	NC	950	792	43	115	933	775	43	115	17	
98	93	Lutheran Life Communities	IL	949	233	213	503	949	233	231	485	0	
99	108	Vista Prairie Communities	MN	939	100	839	0	845	100	745	0	94	
100	95	Christian Living Communities	CO	934	433	309	192	923	425	306	192	11	

NR: Not Ranked in that year

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2024 vs. 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2023 to 2024	
				2024 Units				2023 Units					
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB		
101	61	National Lutheran Communities and Services	MD	932	546	206	180	1,262	680	270	312	-330	
102	96	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	922	39	338	545	0	
103	97	St. John's Healthcare Corp	NY	916	403	38	475	916	403	38	475	0	
104	126	Christian Health Care Center	NJ	913	514	95	304	752	353	95	304	161	
105	92	Blue Skies of Texas	TX	908	699	129	80	950	728	129	93	-42	
106	103	Moorings Park	FL	898	683	109	106	872	659	107	106	26	
107	99	Alliance Health & Human Services	MA	893	0	77	816	893	0	77	816	0	
108	101	Menno Haven, Inc.	PA	880	497	223	160	880	497	223	160	0	
109	104	Landis Communities	PA	876	614	159	103	868	611	154	103	8	
110	102	United Methodist Communities	NJ	872	88	537	247	877	88	542	247	-5	
111	117	Wesley Willows	IL	859	566	202	91	803	565	147	91	56	
112	109	The New Jewish Home	NY	838	24	0	814	838	24	0	814	0	
113	NR	Forefront Living	TX	837	548	201	88	837	548	201	88	0	
114	111	Living Branches	PA	834	459	232	143	834	459	232	143	0	
115	112	Lutheran Social Ministries of Maryland	MD	827	622	90	115	827	622	90	115	0	
116	116	Ascentria Care Alliance	MA	808	45	90	673	808	45	90	673	0	
117	118	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	795	492	193	110	0	
118	119	Heritage Pointe Communities	IN	785	187	255	343	785	187	255	343	0	
119	120	Westminster-Canterbury on Chesapeake Bay	VA	783	595	80	108	781	593	80	108	2	
120	122	St. Ann's Community	NY	769	246	75	448	769	246	75	448	0	
121	123	Grace Inspired Ministries	PA	767	451	151	165	767	451	151	165	0	
122	124	United Church of Christ Homes	PA	766	267	124	375	766	267	124	375	0	
123	125	Sunnyside Communities	VA	756	478	151	127	759	481	151	127	-3	
124	NR	Unitas Communities fka Morningstar Living / Moravian Manor Comm	PA	753	470	137	146	753	470	137	146	0	
125	138	Messiah Lifeways	PA	753	455	163	135	672	375	163	134	81	

NR: Not Ranked in that year

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2024 vs. 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2023 to 2024	
				2024 Units				2023 Units					
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB		
126	135	Episcopal Seniorlife Communities	NY	752	407	193	152	681	334	193	154	71	
127	128	Ohio Masonic Communities	OH	734	351	249	134	729	346	249	134	5	
128	127	Futura Age	WA	733	221	114	398	733	221	114	398	0	
129	129	Simpson Senior Services	PA	727	496	149	82	726	454	170	102	1	
130	130	Bethany Lutheran Homes Inc	WI	726	282	321	123	726	282	321	123	0	
131	131	Emerald Communities	WA	725	527	107	91	725	527	107	91	0	
132	105	Masonic Homes of Kentucky, Inc	KY	714	449	129	136	863	449	181	233	-149	
133	110	Christian Care Communities	KY	713	262	154	297	835	262	154	419	-122	
134	140	Benevolent Corporation Cedar Community	WI	706	412	219	75	669	397	197	75	37	
135	133	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	697	503	91	103	0	
136	132	Sunset Manor, Inc.	MI	697	385	312	0	698	386	312	0	-1	
137	134	Ebenezer Society	MN	696	0	443	253	696	0	443	253	0	
138	172	Baptist Homes & Healthcare Ministries	MO	680	168	119	393	494	126	132	236	186	
139	113	Luthercare	PA	678	482	110	86	823	484	128	211	-145	
140	136	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	678	320	206	152	0	
141	137	Vincentian Collaborative Services	PA	675	66	82	527	675	66	82	527	0	
142	139	Lutheran Life Villages	IN	672	183	164	325	672	183	164	325	0	
143	163	Community First Solutions	OH	657	220	309	128	528	201	199	128	129	
144	142	Friends Homes, Inc.	NC	646	445	92	109	646	445	92	109	0	
145	143	Rockwood Retirement Communities	WA	638	445	148	45	637	444	148	45	1	
146	144	Smith Senior Living	IL	636	322	144	170	636	322	144	170	0	
147	146	Wellspring Lutheran Services	MI	635	125	169	341	635	125	169	341	0	
148	169	Eliza Jennings Senior Care Network	OH	628	176	207	245	506	176	114	216	122	
149	147	Morningside Ministries	TX	625	395	90	140	625	395	90	140	0	
150	148	ThriveMore	NC	594	357	136	101	594	358	135	101	0	

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2024 vs. 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2023 to 2024	
				2024 Units				2023 Units					
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB		
151	149	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	587	238	229	120	0	
152	NR	Brethren Retirement Community	OH	587	228	199	160	587	228	199	160	0	
153	150	Havenwood Heritage Heights	NH	567	367	63	137	567	367	63	137	0	
154	152	Episcopal Communities & Services for Seniors	CA	563	443	120	0	562	443	119	0	1	
155	151	Bethel	NY	563	170	130	263	563	170	130	263	0	
156	153	The Legacy Senior Communities	TX	557	298	145	114	562	298	150	114	-5	
157	154	Cardinal Ritter Senior Services	MO	557	205	122	230	557	205	122	230	0	
158	155	Friendly Senior Living	NY	555	298	57	200	555	298	57	200	0	
159	>200	Sholom Community Alliance	MN	552	153	142	257	296	153	143	0	256	
160	>200	Silverstone Living	NH	550	286	139	125	352	258	48	46	198	
161	156	Ararat Home of Los Angeles	CA	550	73	153	324	550	73	153	324	0	
162	159	Bluestem Communities	KS	549	325	61	163	541	317	61	163	8	
163	157	Church Homes, Inc.	CT	542	319	24	199	542	319	24	199	0	
164	162	Redstone Presbyterian SeniorCare	PA	535	307	151	77	533	304	152	77	2	
165	165	Episcopal Retirement Services	OH	522	309	75	138	522	309	75	138	0	
166	166	Christian Village Communities	OH	521	189	182	150	521	189	182	150	0	
167	167	Willow Brook Christian Communities	OH	518	267	167	84	518	267	167	84	0	
168	168	CRISTA Senior Living	WA	517	374	143	0	517	374	143	0	0	
169	160	Medford Leas	NJ	514	395	105	14	537	394	119	24	-23	
170	158	St. John's United	MT	505	203	201	101	542	201	191	150	-37	
171	171	Judson Services, Inc.	OH	500	227	135	138	500	227	135	138	0	
172	173	The Village of St. Edward	OH	492	126	285	81	493	177	235	81	-1	
173	181	Convivial Life, Inc.	FL	488	307	181	0	439	258	181	0	49	
174	174	St. Paul's Senior Services	CA	484	243	182	59	484	243	182	59	0	
175	175	Bethany St. Joseph Corporation	WI	473	135	158	180	473	135	158	180	0	

NR: Not Ranked in that year

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2024 vs. 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2023 to 2024	
				2024 Units				2023 Units					
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB		
176	176	Deaconess Abundant Life Communities	MA	469	283	144	42	469	283	144	42	0	
177	178	The Loomis Communities, Inc.	MA	468	368	58	42	456	359	55	42	12	
178	177	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	466	185	0	281	0	
179	>200	Resthaven	MI	466	183	138	145	338	79	114	145	128	
180	>200	Taylor Community	NH	457	310	147	0	293	278	15	0	164	
181	179	Baptist Senior Family	PA	451	326	62	63	451	326	62	63	0	
182	NR	Guardian Angels Senior Services	MN	451	36	295	120	451	36	295	120	0	
183	180	Michigan Masonic Homes	MI	442	38	155	249	442	38	155	249	0	
184	184	Bethesda	MN	430	89	93	248	430	89	93	248	0	
185	183	Allegheny Lutheran Social Ministries	PA	428	173	103	152	431	183	96	152	-3	
186	185	Good Shepherd Communities	NY	427	194	67	166	427	194	67	166	0	
187	182	Lutheran Home & Harwood Place	WI	427	169	98	160	434	170	104	160	-7	
188	187	Skaalen Retirement Services	WI	421	229	101	91	421	229	101	91	0	
189	188	Wesbury UMC	PA	418	117	91	210	418	117	91	210	0	
190	189	A.G. Rhodes	GA	416	0	0	416	416	0	0	416	0	
191	192	Jewish Senior Life of Metropolitan of Detroit	MI	415	294	121	0	394	290	104	0	21	
192	186	Parker Health Group	NJ	407	0	60	347	427	0	80	347	-20	
193	190	Beechwood Continuing Care, Inc.	NY	406	186	0	220	408	188	0	220	-2	
194	191	CJE SeniorLife	IL	405	240	165	0	405	240	165	0	0	
195	NR	Oaknoll	IA	397	301	38	58	397	301	38	58	0	
196	195	Canterbury Woods	NY	394	296	48	50	386	296	40	50	8	
197	193	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	393	134	83	176	0	
198	194	Trinity Senior Services fka Milwaukee Catholic Home	WI	386	205	74	107	387	206	74	107	-1	
199	NR	Pleasant View Communities	PA	380	229	59	92	380	229	59	92	0	
200	161	HutsonWood	TN	371	0	72	299	537	0	72	465	-166	
		TOTAL UNITS		309,480	158,814	69,962	80,704	300,795	152,371	65,899	82,525	8,685	

NR: Not Ranked in that year

Organizational Characteristics: Units

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

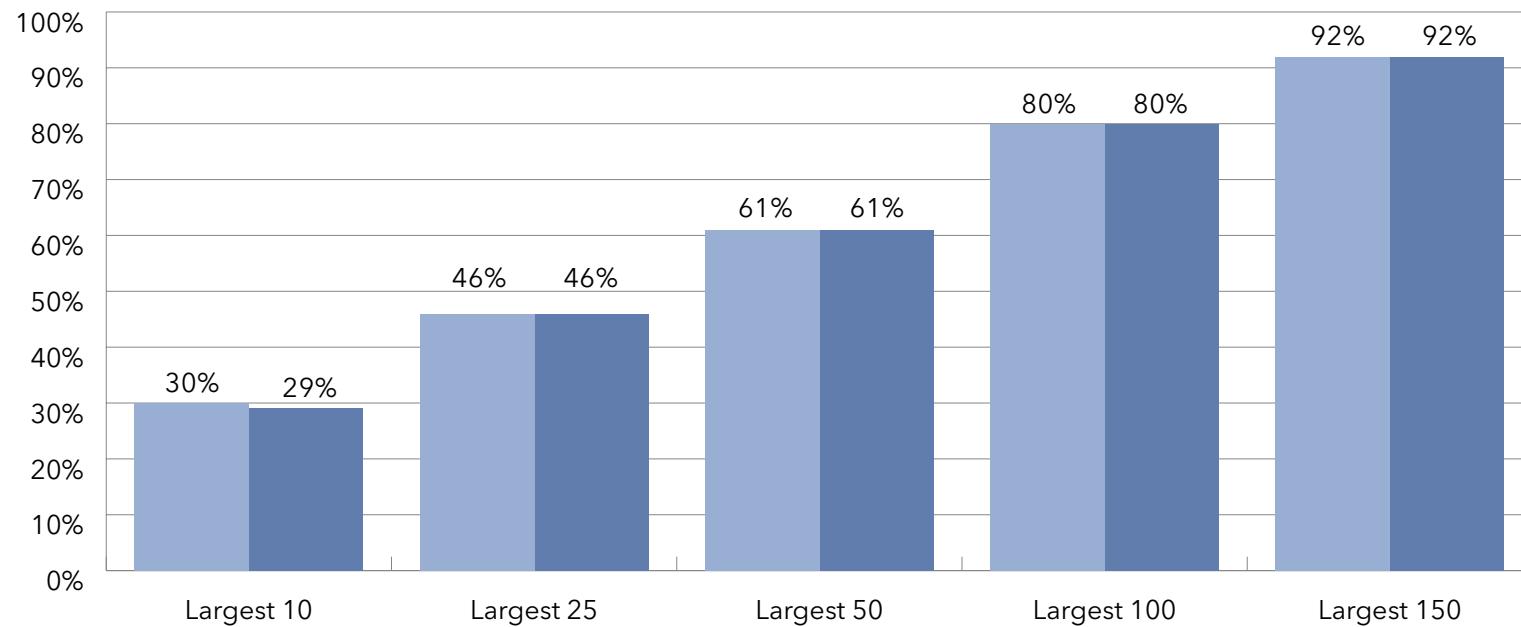
Largest	ILU	ALU	NCB	Total Units	% as total of LZ 200 units
10	52,840	15,981	21,978	90,799	29%
25	78,602	29,280	33,340	141,222	46%
50	101,162	41,495	45,995	188,652	61%
100	129,753	55,629	62,077	247,459	80%
150	147,740	64,141	73,580	285,461	92%
200	158,810	69,962	80,628	309,400	100%

Analysis of Unit Mix for Each Year's Respective LZ 200 Listing				
2020 LZ 200				
2019 avg units/system	750.4	319.6	453.1	1,513.5
Percent of total	49.6%	21.1%	29.9%	100%
2021 LZ 200				
2020 avg units/system	738.7	322.9	448.9	1,510.5
Percent of total	48.9%	21.4%	29.7%	100%
2022 LZ 200				
2021 avg units/system	763.6	328.9	441.2	1,533.7
Percent of total	49.8%	21.4%	28.8%	100%
2023 LZ 200				
2022 avg units/system	762.0	331.5	429.2	1,522.7
Percent of total	50.0%	21.8%	28.2%	100%
2024 LZ 200				
2023 avg units/system	761.9	329.5	412.6	1,504.0
Percent of total	50.7%	21.9%	27.4%	100%
2025 LZ 200				
2024 avg units/system	794.1	349.8	403.1	1,547.0
Percent of total	51.3%	22.6%	26.1%	100%

Largest	2024 Total Units	2023 Total Units	Change in total units	Percent change in total units
10	90,799	89,046	1,753	1.9%
25	141,222	137,784	3,438	2.4%
50	188,652	183,249	5,403	2.9%
100	247,459	239,525	7,934	3.2%
150	285,461	277,438	8,023	2.8%
200	309,400	300,795	8,605	2.8%

Organizational Characteristics: Locations

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

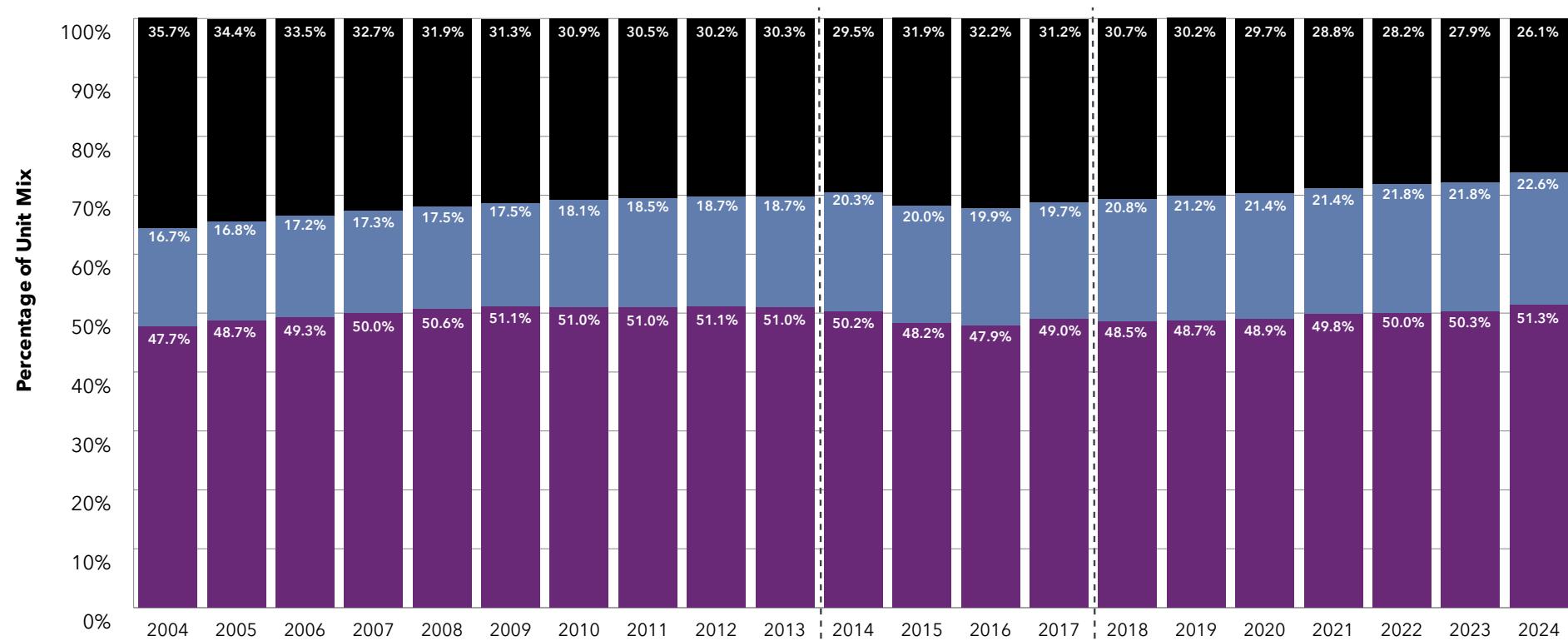


KEY:

2023 2024

Organizational Characteristics: Locations

Total Mix by Year, by Percent, 2004 Through 2024 for 2025 LZ 200



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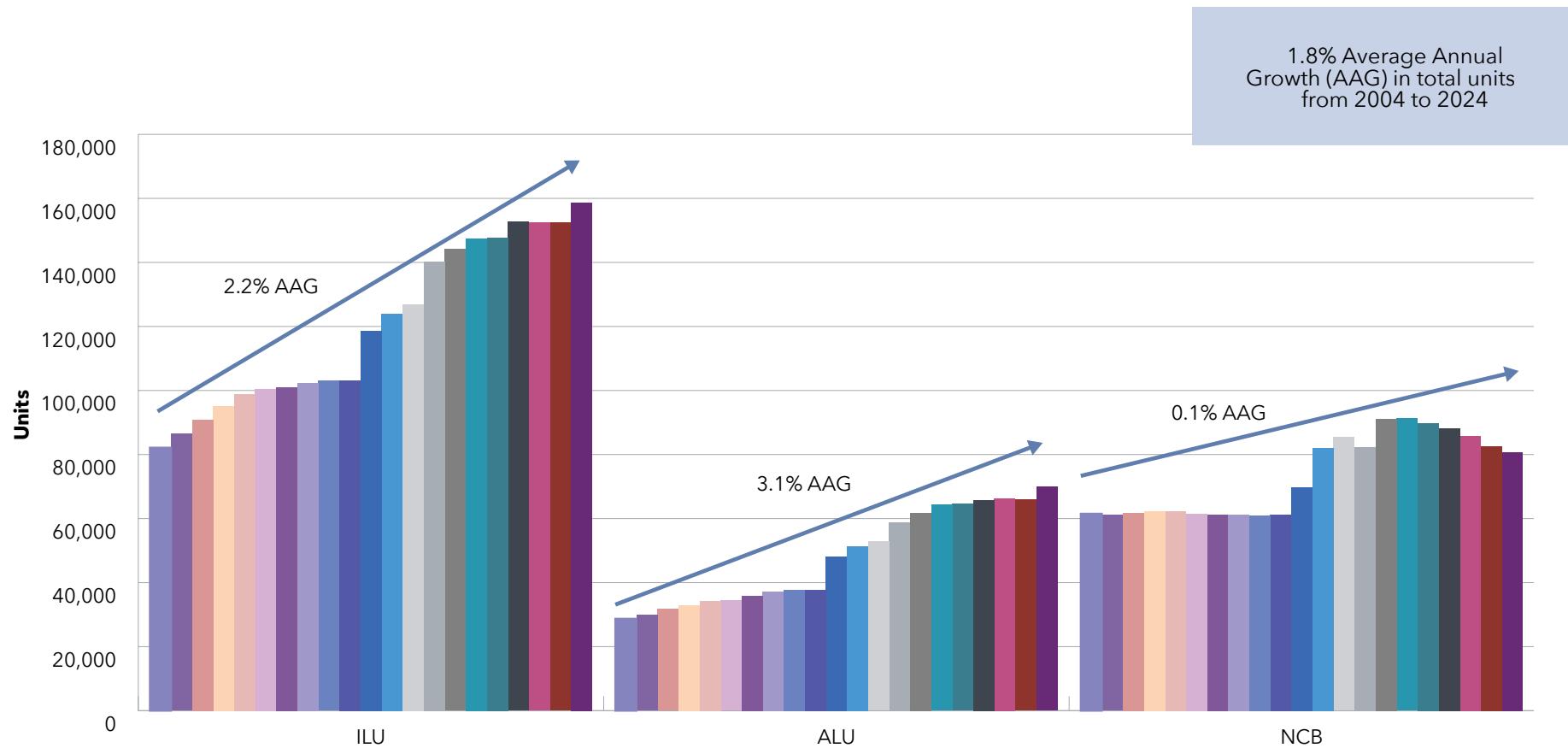
■ ILU ■ ALU ■ NCB

Note increase from 100 to 150 with the 2014 publication

Note increase from 150 to 200 with the 2018 publication

Organizational Characteristics: Locations

Unit Type Comparison, 2004 Through 2024 for 2025 LZ 200



KEY:

2004	2005	2006	2007	2008	2009	2010
2011	2012	2013	2014	2015	2016	2017
2018	2019	2020	2021	2022	2023	2024

Note increase from 100 to 150 with the 2014 publication
 Note increase from 150 to 200 with the 2018 publication

Organizational Characteristics: Communities

Rank Detailed by Communities (2024 vs 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Communities								Change in Total Communities from 2023 to 2024		
				2024 Communities					2023 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
1	1	National Senior Communities	DC	18	18	0	0	0	17	17	0	0	0	1
2	2	The Evangelical Lutheran Good Samaritan Society	SD	132	41	9	15	67	118	50	7	6	55	14
3	3	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	28	28	0	0	0	27	27	0	0	0	1
4	4	Presbyterian Homes & Services	MN	56	17	38	0	1	56	17	38	0	1	0
5	5	Ascension living	MO	35	9	5	2	19	35	9	5	2	19	0
6	6	HumanGood	CA	23	19	1	3	0	21	21	0	0	0	2
7	7	Covenant Living Communities and Services	IL	20	17	2	1	0	19	15	2	1	1	1
8	8	Lifespace Communities, Inc.	TX	16	16	0	0	0	17	17	0	0	0	-1
9	9	Trinity Health Senior Communities	MI	35	4	11	4	16	34	6	10	2	16	1
10	10	Benedictine	MN	35	11	4	4	16	36	11	4	4	17	-1
11	11	Front Porch Communities and Services	CA	16	16	0	0	0	16	16	0	0	0	0
12	12	Pacific Retirement Services	OR	12	12	0	0	0	12	12	0	0	0	0
13	13	Westminster Retirement Communities of Florida	FL	11	11	0	0	0	11	11	0	0	0	0
14	18 & 65	EverTrue fka Lutheran Sr. Services & Diakon Lutheran Social Ministries	MO	13	12	0	1	0	9	8	0	1	0	4
15	14	Cassia	MN	46	0	2	27	17	46	0	2	27	17	0
16	19	Concordia Lutheran Ministries	PA	18	7	0	9	2	16	7	0	7	2	2
17	17	Otterbein SeniorLife	OH	20	11	0	0	9	18	9	0	0	9	2
18	15	Presbyterian Senior Living	PA	16	11	4	1	0	18	12	4	2	0	-2
19	26	Transforming Age	WA	19	4	6	9	0	17	3	11	3	0	2
20	20	BHI Senior Living, Inc.	IN	10	10	0	0	0	9	9	0	0	0	1
21	16	Asbury Communities, Inc.	MD	9	5	2	2	0	11	11	0	0	0	-2
22	22	Ecumen	MN	26	6	3	17	0	26	6	3	17	0	0
23	21	The Carmelite System	NY	13	6	1	1	5	14	2	2	1	9	-1
24	23	Springpoint Senior Living, Inc.	NJ	10	8	0	1	1	10	8	0	1	1	0
25	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	5	3	1	0	1	5	3	1	0	1	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2024 vs 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Communities								Change in Total Communities from 2023 to 2024		
				2024 Communities					2023 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
26	24	Ohio Living Communities	OH	11	9	0	0	2	11	9	0	0	2	0
27	28	The Kendal Corporation	DE	10	7	1	1	1	9	6	2	0	1	1
28	29	Bethesda Senior Living Communities	CO	22	0	6	16	0	22	0	6	16	0	0
29	32	Presbyterian Manors of Mid-America, Inc.	KS	16	14	1	1	0	15	14	0	1	0	1
30	27	Volunteers of America	VA	9	3	1	3	2	23	4	2	9	8	-14
31	31	National Church Residences	OH	15	3	3	9	0	14	3	2	9	0	1
32	30	Christian Care Companies	AZ	6	0	5	0	1	6	0	5	0	1	0
33	33	Willow Valley Communities	PA	3	3	0	0	0	3	3	0	0	0	0
34	34	Homewood Retirement Centers, Inc.	MD	5	4	1	0	0	5	5	0	0	0	0
35	41	Buckner Retirement Services	TX	7	7	0	0	0	6	6	0	0	0	1
36	35	Greencroft Communities	IN	9	7	0	2	0	9	7	0	2	0	0
37	68 & 145	Kintura fka Brightspire and Well-Spring Group	NC	5	5	0	0	0	3	3	0	0	0	2
38	57	Masonicare	CT	15	2	5	6	2	7	2	2	2	1	8
39	37	Lutheran Services Carolinas	NC	10	3	1	0	6	10	3	1	0	6	0
40	78 & 199	Eventide and Tabitha	MN	10	8	0	1	1	6	5	0	1	0	4
41	36	ArchCare	NY	7	0	0	1	6	6	0	0	1	5	1
42	38	Baptist Village Communities	OK	12	3	8	1	0	12	3	8	1	0	0
43	40	Covenant Health	MA	14	0	0	4	10	14	0	0	4	10	0
44	42	Loretto	NY	9	1	2	4	2	9	1	2	4	2	0
45	44	Franciscan Communities, Inc.	IL	8	4	1	3	0	8	4	1	3	0	0
46	43	Life Enriching Communities	OH	6	6	0	0	0	6	6	0	0	0	0
47	45	United Church Homes, Inc.	OH	15	4	7	1	3	14	4	6	1	3	1
48	47	Methodist Retirement Communities	TX	8	5	2	0	1	8	5	2	1	0	0
49	48	Immanuel	NE	10	9	1	0	0	10	9	1	0	0	0
50	56	Vivie fka KNWM (Knuite Nelson / Walker Methodist)	MN	17	0	6	9	2	15	0	6	7	2	2

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2024 vs 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2023 to 2024	
				2024 Communities					2023 Communities						
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH		
51	46	St. Francis Health Services of Morris, Inc.	MN	32	0	6	12	14	30	0	6	10	14	2	
52	39	Bethesda Health Group, Inc.	MO	12	0	7	2	3	13	0	7	2	4	-1	
53	49	Hebrew SeniorLife	MA	4	2	1	0	1	4	2	0	1	1	0	
54	55	Presbyterian Villages of Michigan	MI	10	1	7	2	0	10	1	7	2	0	0	
55	51	Mississippi Methodist Senior Services, Inc.	MS	12	2	7	1	2	12	2	5	3	2	0	
56	83	FellowshipLIFE, Inc.	NJ	5	5	0	0	0	4	4	0	0	0	1	
57	52	LifeSpire of Virginia	VA	5	4	1	0	0	5	5	0	0	0	0	
58	54	Presbyterian Living fka Presbyterian Homes, Inc.	IL	4	3	1	0	0	4	3	1	0	0	0	
59	98	Sun Health	AZ	4	4	0	0	0	3	3	0	0	0	1	
60	53	Presbyterian SeniorCare Network	PA	10	3	1	4	2	5	5	0	0	0	5	
61	91	EveryAge	NC	4	4	0	0	0	3	3	0	0	0	1	
62	58	Magnolia Manor, Inc.	GA	8	2	4	1	1	8	2	4	1	1	0	
63	71	Phoebe Ministries	PA	4	4	0	0	0	4	4	0	0	0	0	
64	NR	Friendship	VA	4	2	0	1	1	4	2	0	1	1	0	
65	59	Heritage Ministries	NY	8	4	2	1	1	8	4	2	1	1	0	
66	115	Presbyterian Homes of Georgia, Inc.	GA	6	2	3	0	1	3	3	0	0	0	3	
67	64	Wesley Enhanced Living	PA	5	4	1	0	0	5	5	0	0	0	0	
68	66	St. Andrew's Resources for Seniors System	MO	8	2	2	1	3	8	2	2	1	3	0	
69	67	Holland Home	MI	2	2	0	0	0	2	2	0	0	0	0	
70	69	American Baptist Homes of the Midwest	MN	7	5	0	0	2	7	5	0	0	2	0	
71	70	SpiriTrust Lutheran	PA	6	6	0	0	0	6	6	0	0	0	0	
72	73	Lutheran Homes of South Carolina Inc.	SC	5	5	0	0	0	5	5	0	0	0	0	
73	60	Illuminus, Inc.	WI	9	1	2	2	4	9	1	2	2	4	0	
74	72	Wesley	WA	4	0	4	0	0	4	0	4	0	0	0	
75	74	Friendship Villages of St. Louis	MO	2	2	0	0	0	2	2	0	0	0	0	

NR: Not Ranked in that year

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2024 vs 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Communities								Change in Total Communities from 2023 to 2024		
				2024 Communities					2023 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
76	106	Mather	IL	4	3	1	0	0	3	2	1	0	0	1
77	76	Legacy Lifecare	MA	7	0	0	1	6	7	0	0	1	6	0
78	114	Community Wellness Partners	NY	4	0	1	1	2	4	0	1	1	2	0
79	107	Garden Spot Communities	PA	3	2	0	0	1	2	1	0	0	1	1
80	75	Eskaton	CA	8	1	1	6	0	8	1	1	6	0	0
81	79	Ingleside	MD	3	3	0	0	0	3	3	0	0	0	0
82	62	Baruch Senior Ministries	MI	32	0	0	32	0	33	0	0	33	0	-1
83	77	United Methodist Homes	NY	4	3	0	1	0	4	3	0	1	0	0
84	85	Brio Living Services	MI	6	2	3	1	0	5	2	2	1	0	1
85	89	Pinnacle Living	VA	6	4	0	2	0	4	4	0	0	0	2
86	81	Lutheran SeniorLife	PA	11	2	8	0	1	11	2	8	0	1	0
87	63	Saint Therese	MN	6	5	0	1	0	5	5	0	0	0	1
88	82	The United Methodist Retirement Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
89	80	Sequoia Living, Inc.	CA	4	4	0	0	0	4	4	0	0	0	0
90	141	Felician Services Inc.	IL	7	2	1	1	3	5	1	0	1	3	2
91	84	Goodwin Living	VA	3	2	1	0	0	3	2	1	0	0	0
92	NR	Tandem Living fka Mennonite Home Communities	PA	2	2	0	0	0	2	2	0	0	0	0
93	86	Presbyterian Communities of South Carolina	SC	6	6	0	0	0	6	6	0	0	0	0
94	88	Providence Life Services	IL	4	1	2	0	1	5	1	3	1	0	-1
95	90	The RiverWoods Group	NH	3	3	0	0	0	3	3	0	0	0	0
96	87	Liberty Lutheran Services	PA	5	3	1	1	0	5	3	1	1	0	0
97	94	Givens Communities	NC	2	2	0	0	0	2	2	0	0	0	0
98	93	Lutheran Life Communities	IL	4	3	0	0	1	4	2	1	0	1	0
99	108	Vista Prairie Communities	MN	12	0	1	11	0	10	0	1	9	0	2
100	95	Christian Living Communities	CO	6	3	0	3	0	6	3	0	3	0	0

NR: Not Ranked in that year

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2024 vs 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2023 to 2024	
				2024 Communities					2023 Communities						
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH		
101	61	National Lutheran Communities and Services	MD	3	2	0	1	0	4	3	0	1	0	-1	
102	96	Methodist Homes of Alabama & Northwest Florida	AL	6	2	0	3	1	6	2	0	3	1	0	
103	97	St. John's Healthcare Corp	NY	4	0	1	1	2	4	0	1	1	2	0	
104	126	Christian Health Care Center	NJ	8	2	4	1	1	7	1	4	1	1	1	
105	92	Blue Skies of Texas	TX	2	2	0	0	0	2	2	0	0	0	0	
106	103	Moorings Park	FL	3	1	2	0	0	3	1	2	0	0	0	
107	99	Alliance Health & Human Services	MA	8	0	0	0	8	8	0	0	0	8	0	
108	101	Menno Haven, Inc.	PA	2	2	0	0	0	2	2	0	0	0	0	
109	104	Landis Communities	PA	4	1	2	1	0	4	1	2	1	0	0	
110	102	United Methodist Communities	NJ	4	1	0	3	0	4	1	0	3	0	0	
111	117	Wesley Willows	IL	3	1	1	1	0	2	1	1	0	0	1	
112	109	The New Jewish Home	NY	3	0	1	0	2	3	0	1	0	2	0	
113	NR	Forefront Living	TX	2	2	0	0	0	2	2	0	0	0	0	
114	111	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0	
115	112	Lutheran Social Ministries of Maryland	MD	2	2	0	0	0	2	2	0	0	0	0	
116	116	Ascentria Care Alliance	MA	5	0	0	0	5	5	0	0	0	5	0	
117	118	Oakwood Lutheran Senior Ministries	WI	2	2	0	0	0	2	2	0	0	0	0	
118	119	Heritage Pointe Communities	IN	3	3	0	0	0	3	3	0	0	0	0	
119	120	Westminster-Canterbury on Chesapeake Bay	VA	2	1	1	0	0	2	1	1	0	0	0	
120	122	St. Ann's Community	NY	5	0	2	1	2	5	0	2	1	2	0	
121	123	Grace Inspired Ministries	PA	2	2	0	0	0	2	2	0	0	0	0	
122	124	United Church of Christ Homes	PA	6	0	2	0	4	6	0	2	0	4	0	
123	125	Sunnyside Communities	VA	3	3	0	0	0	3	3	0	0	0	0	
124	NR	Unitas Communities fka Morningstar Living / Moravian Manor Comm.	PA	2	2	0	0	0	2	2	0	0	0	0	
125	138	Messiah Lifeways	PA	2	1	1	0	0	2	1	1	0	0	0	

NR: Not Ranked in that year

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2024 vs 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Communities								Change in Total Communities from 2023 to 2024		
				2024 Communities					2023 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
126	135	Episcopal Seniorlife Communities	NY	10	0	6	3	1	9	0	5	3	1	1
127	128	Ohio Masonic Communities	OH	3	2	0	1	0	3	2	0	1	0	0
128	127	Futura Age	WA	2	1	0	0	1	2	1	0	0	1	0
129	129	Simpson Senior Services	PA	3	3	0	0	0	3	3	0	0	0	0
130	130	Bethany Lutheran Homes Inc	WI	10	2	1	6	1	10	2	1	6	1	0
131	131	Emerald Communities	WA	2	2	0	0	0	2	2	0	0	0	0
132	105	Masonic Homes of Kentucky, Inc	KY	6	2	2	1	1	3	2	1	0	0	3
133	110	Christian Care Communities	KY	9	4	3	2	0	10	5	3	2	0	-1
134	140	Benevolent Corporation Cedar Community	WI	8	1	3	3	1	7	1	3	2	1	1
135	133	Brazos Presbyterian Homes Holding Inc.	TX	3	3	0	0	0	3	3	0	0	0	0
136	132	Sunset Manor, Inc.	MI	4	0	2	2	0	4	0	2	2	0	0
137	134	Ebenezer Society	MN	10	0	0	6	4	8	0	0	6	2	2
138	172	Baptist Homes & Healthcare Ministries	MO	7	3	1	1	2	7	2	2	1	2	0
139	113	Luthercare	PA	2	1	1	0	0	3	1	1	0	1	-1
140	136	United Lutheran Program for the Aging, Inc.	WI	5	0	1	3	1	5	0	1	3	1	0
141	137	Vincentian Collaborative Services	PA	4	2	0	0	2	4	2	0	0	2	0
142	139	Lutheran Life Villages	IN	6	2	0	2	2	6	2	0	2	2	0
143	163	Community First Solutions	OH	5	2	0	2	1	4	2	0	1	1	1
144	142	Friends Homes, Inc.	NC	2	2	0	0	0	2	2	0	0	0	0
145	143	Rockwood Retirement Communities	WA	2	2	0	0	0	2	2	0	0	0	0
146	144	Smith Senior Living	IL	2	2	0	0	0	2	2	0	0	0	0
147	146	Wellspring Lutheran Services	MI	9	1	2	2	4	9	1	2	2	4	0
148	169	Eliza Jennings Senior Care Network	OH	4	2	0	1	1	3	1	0	1	1	1
149	147	Morningside Ministries	TX	3	2	1	0	0	3	2	1	0	0	0
150	148	ThriveMore	NC	4	3	0	1	0	4	2	1	1	0	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2024 vs 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2023 to 2024	
				2024 Communities					2023 Communities						
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH		
151	149	Shepherd of the Valley Lutheran Retirement Services	OH	4	2	1	0	1	4	2	1	0	1	0	
152	NR	Brethren Retirement Community	OH	3	2	1	0	0	3	2	1	0	0	0	
153	150	Havenwood Heritage Heights	NH	2	2	0	0	0	2	2	0	0	0	0	
154	152	Episcopal Communities & Services for Seniors	CA	4	3	0	1	0	4	3	0	1	0	0	
155	151	Bethel	NY	5	1	1	1	2	5	1	1	1	2	0	
156	153	The Legacy Senior Communities	TX	2	2	0	0	0	2	2	0	0	0	0	
157	154	Cardinal Ritter Senior Services	MO	3	0	1	1	1	3	0	1	1	1	0	
158	155	Friendly Senior Living	NY	4	0	2	1	1	4	0	2	1	1	0	
159	207	Sholom Community Alliance	MN	5	0	1	2	2	5	0	1	2	2	0	
160	200	Silverstone Living	NH	3	2	0	1	0	2	2	0	0	0	1	
161	156	Ararat Home of Los Angeles	CA	3	1	0	0	2	3	1	0	0	2	0	
162	159	Bluestem Communities	KS	2	2	0	0	0	2	2	0	0	0	0	
163	157	Church Homes, Inc.	CT	2	2	0	0	0	2	2	0	0	0	0	
164	162	Redstone Presbyterian SeniorCare	PA	3	1	2	0	0	3	1	2	0	0	0	
165	165	Episcopal Retirement Services	OH	3	3	0	0	0	3	3	0	0	0	0	
166	166	Christian Village Communities	OH	2	2	0	0	0	2	2	0	0	0	0	
167	167	Willow Brook Christian Communities	OH	3	1	1	0	1	3	1	1	0	1	0	
168	168	CRISTA Senior Living	WA	2	0	1	1	0	2	0	1	1	0	0	
169	160	Medford Leas	NJ	2	1	1	0	0	2	1	1	0	0	0	
170	158	St. John's United	MT	5	4	0	1	0	5	4	0	1	0	0	
171	171	Judson Services, Inc.	OH	2	1	1	0	0	2	1	1	0	0	0	
172	173	The Village of St. Edward	OH	3	1	0	2	0	3	1	0	2	0	0	
173	181	Convivial Life, Inc.	FL	2	1	0	1	0	2	1	0	1	0	0	
174	174	St. Paul's Senior Services	CA	4	0	2	1	1	4	0	2	1	1	0	
175	175	Bethany St. Joseph Corporation	WI	12	0	5	5	2	12	0	5	5	2	0	

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Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2024 vs 2023)

2025 Rank	2024 Rank	System Name	State	Summary of Not-for-Profit Communities								Change in Total Communities from 2023 to 2024		
				2024 Communities					2023 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
176	176	Deaconess Abundant Life Communities	MA	3	1	1	1	0	3	1	1	1	0	0
177	178	The Loomis Communities, Inc.	MA	4	0	1	2	1	3	3	0	0	0	1
178	177	Presbyterian Homes and Services of Kentucky	KY	4	0	0	2	2	4	0	0	2	2	0
179	202	Resthaven	MI	4	3	0	1	0	4	3	0	1	0	0
180	208	Taylor Community	NH	4	2	2	0	0	2	1	1	0	0	2
181	179	Baptist Senior Family	PA	2	1	1	0	0	2	1	1	0	0	0
182	NR	Guardian Angels Senior Services	MN	5	0	1	3	1	5	0	1	3	1	0
183	180	Michigan Masonic Homes	MI	2	1	0	0	1	2	1	0	0	1	0
184	184	Bethesda	MN	3	1	1	1	0	3	1	1	1	0	0
185	183	Allegheny Lutheran Social Ministries	PA	3	3	0	0	0	3	3	0	0	0	0
186	185	Good Shepherd Communities	NY	3	2	0	0	1	3	2	0	0	1	0
187	182	Lutheran Home & Harwood Place	WI	2	0	1	0	1	2	0	1	0	1	0
188	187	Skaalen Retirement Services	WI	2	1	1	0	0	2	1	1	0	0	0
189	188	Wesbury UMC	PA	2	1	1	0	0	2	1	1	0	0	0
190	189	A.G. Rhodes	GA	3	0	0	0	3	3	0	0	0	3	0
191	192	Jewish Senior Life of Metropolitain of Detroit	MI	4	0	2	2	0	4	0	2	2	0	0
192	186	Parker Health Group	NJ	5	0	0	1	4	5	0	0	1	4	0
193	190	Beechwood Continuing Care, Inc.	NY	3	0	2	0	1	3	0	2	0	1	0
194	191	CJE SeniorLife	IL	3	1	1	1	0	3	1	1	1	0	0
195	NR	Oaknoll	IA	3	1	2	0	0	3	1	2	0	0	0
196	195	Canterbury Woods	NY	2	2	0	0	0	2	2	0	0	0	0
197	193	South Carolina Baptist Ministries of Aging (SCBMA)	SC	2	2	0	0	0	2	2	0	0	0	0
198	194	Trinity Senior Services fka Milwaukee Catholic Home	WI	2	1	1	0	0	2	1	1	0	0	0
199	NR	Pleasant View Communities	PA	2	1	1	0	0	2	1	1	0	0	0
200	161	HutsonWood	TN	4	0	0	0	4	7	0	0	2	5	-3
		TOTAL COMMUNITIES		1,611	673	288	328	322	1,550	671	272	294	313	61

NR: Not Ranked in that year

Organizational Characteristics: Communities

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

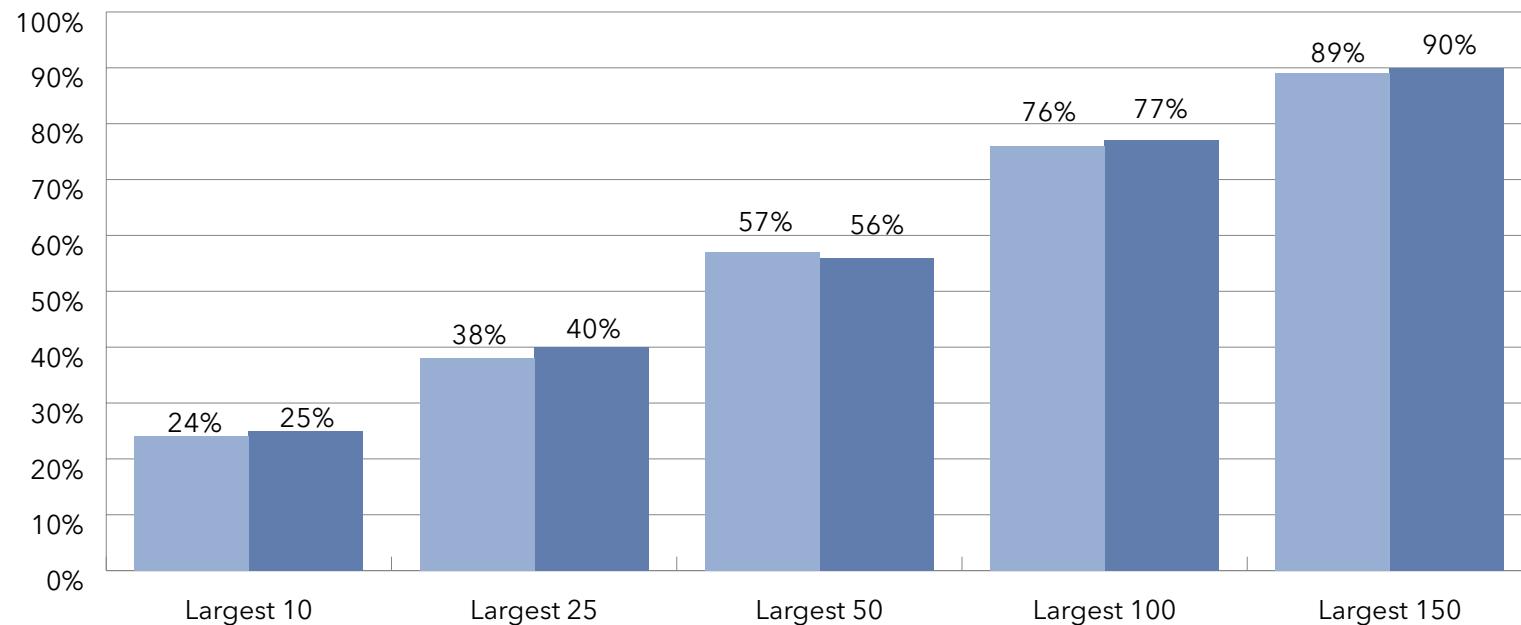
Largest	LPC	IL	AL	NH	ALL	Percent as total of LZ 200
10	180	70	29	119	398	25%
25	302	89	97	154	642	40%
50	409	140	159	193	901	56%
100	537	209	247	243	1,236	77%
150	615	249	296	290	1,450	90%
200	673	288	328	322	1,611	100%

Analysis of Community Mix for Each Year's Respective LZ 200 Listing					
	LPC	IL	AL	NH	ALL
2020 LZ 200					
2019 avg communities/system	3.5	1.3	1.5	1.6	7.9
Percent of total	43.7%	16.9%	18.8%	20.7%	100.0%
2021 LZ 200					
2020 avg communities/system	3.3	1.4	1.6	1.7	8.0
Percent of total	43.4%	16.9%	18.6%	21.0%	100.0%
2022 LZ 200					
2021 avg communities/system	3.4	1.4	1.5	1.6	7.9
Percent of total	43.3%	17.5%	18.6%	20.6%	100.0%
2023 LZ 200					
2022 avg communities/system	3.4	1.4	1.5	1.5	7.8
Percent of total	43.5%	18.2%	19.3%	19.0%	100.0%
2024 LZ 200					
2023 avg communities/system	3.4	1.4	1.5	1.6	7.9
Percent of total	43.1%	17.4%	19.1%	20.4%	100.0%
2025 LZ 200					
2024 avg communities/system	3.4	1.4	1.6	1.6	8.0
Percent of total	41.8%	17.9%	20.4%	20.0%	100.0%

Largest	2023 Total Communities	2022 Total Communities	Change in total communities	Percent change in total communities
10	398	380	18	4.5%
25	642	618	24	3.7%
50	901	869	32	3.6%
100	1,236	1,184	52	4.2%
150	1,450	1,390	60	4.1%
200	1,611	1,550	61	3.8%

Organizational Characteristics: Communities

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

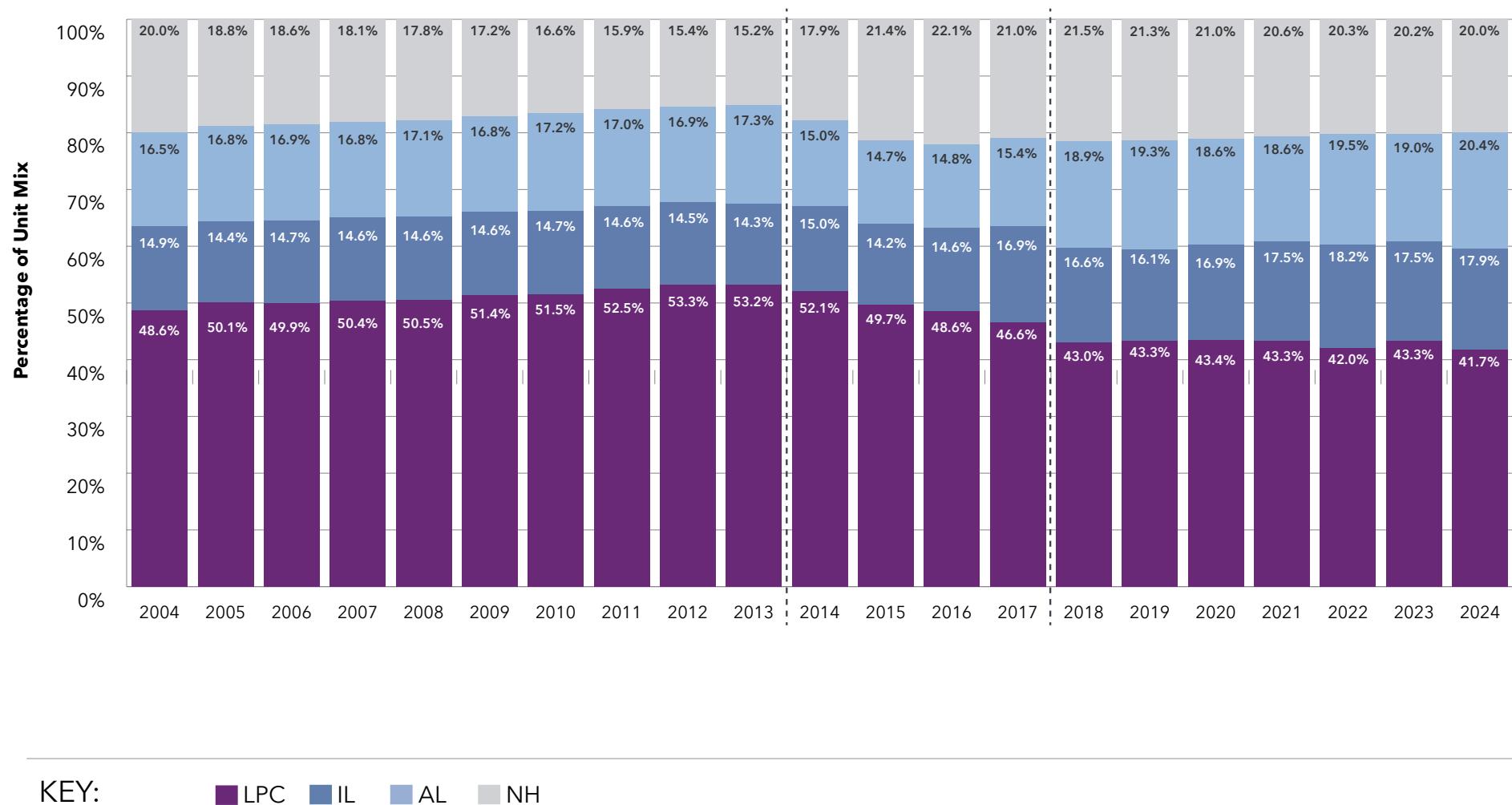


KEY:



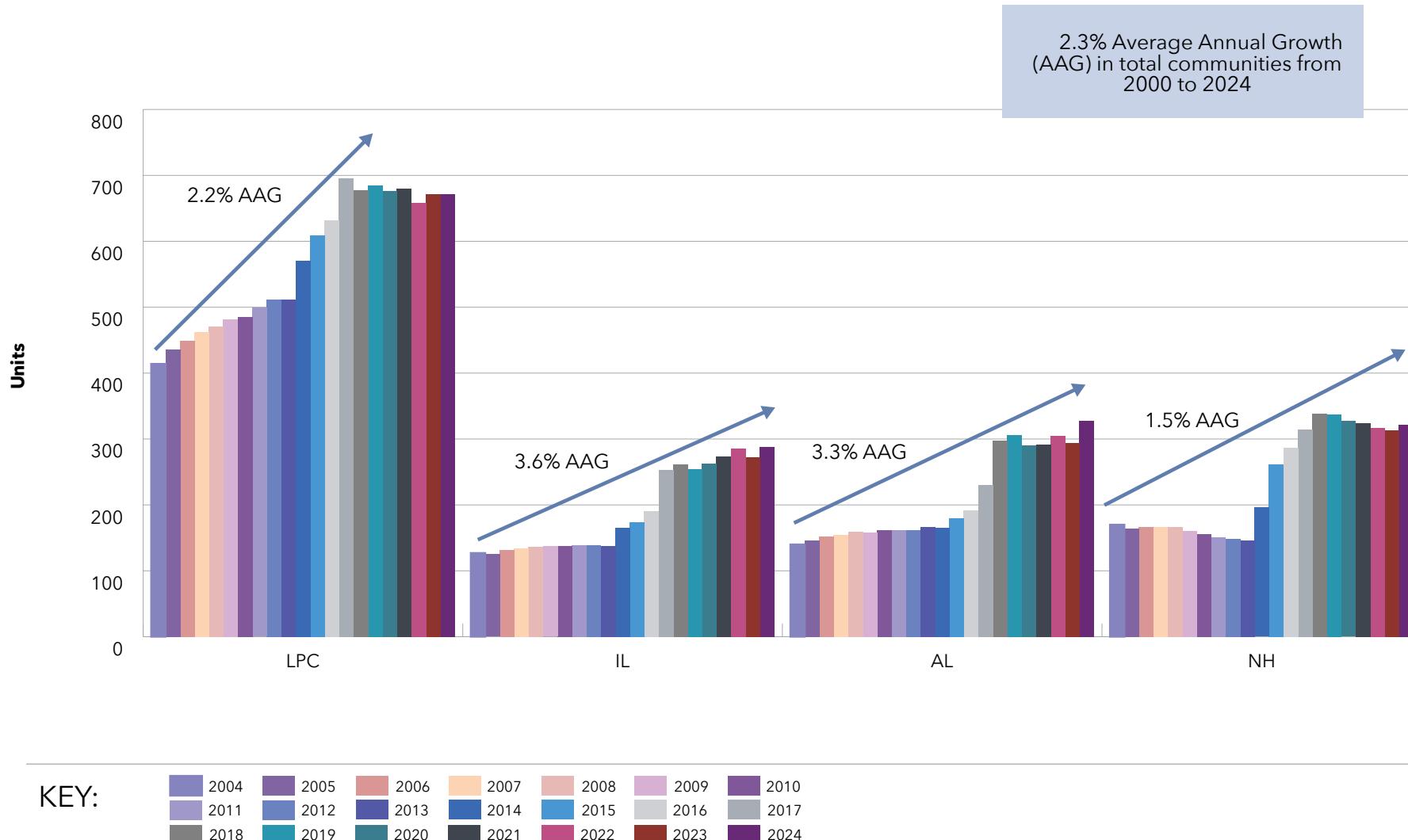
Organizational Characteristics: Communities

Total Mix by Year, by Percent, 2004 Through 2024 for 2025 LZ 200



Organizational Characteristics: Communities

Community Type Comparison, by Community, 2004 Through 2024 for 2025 LZ 200



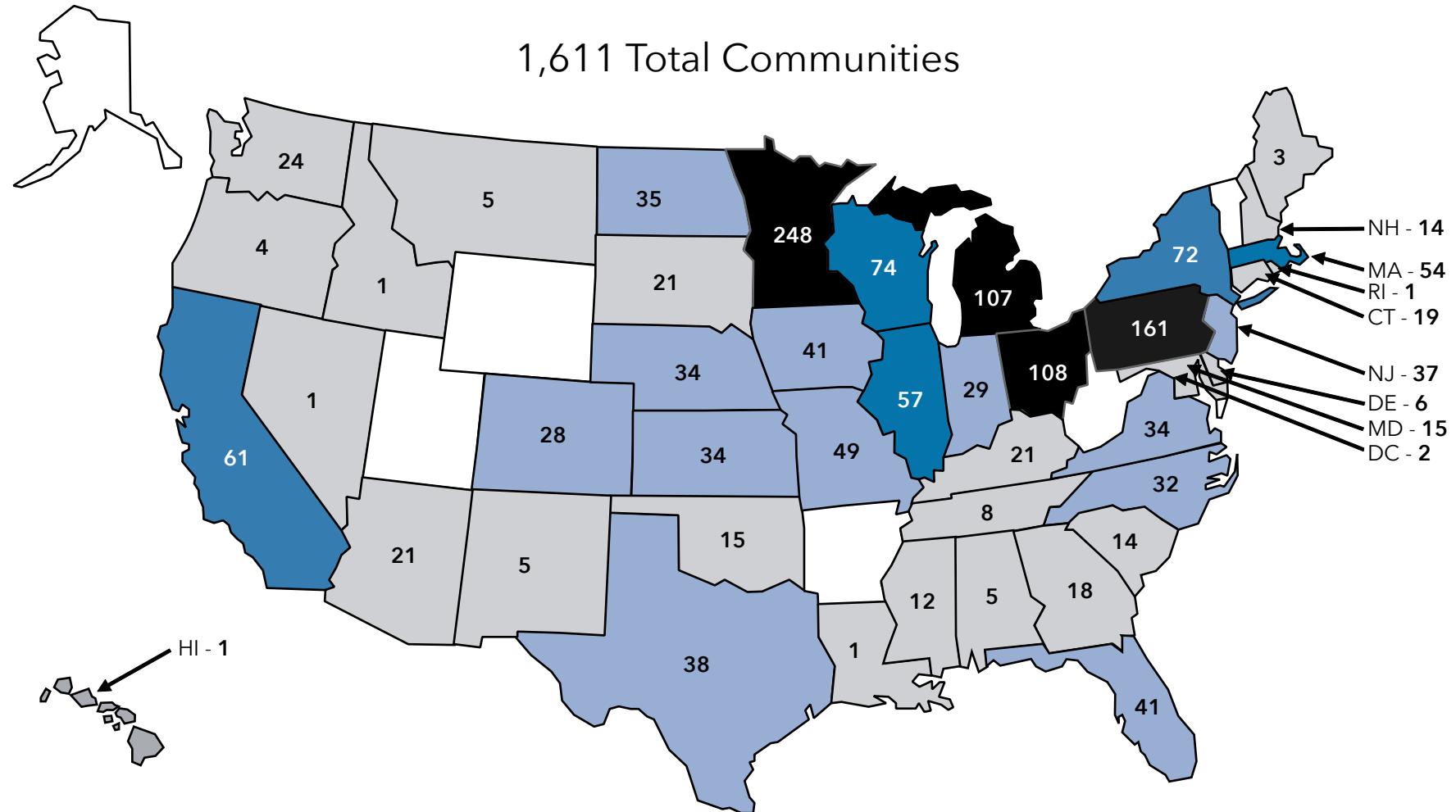
Organizational Characteristics: Locations

Top Five States by Community Type

LPC			ILF			ALF			NH		
1	PA	92	1	MN	60	1	MN	86	1	MN	63
2	OH	57	2	PA	30	2	MI	44	2	MA	32
3	CA	40	3	MI	27	3	WI	23	3	NY	25
4	MN	39	4	WI	21	4	PA	21	4	OH	18
5	TX	31	5	NY	21	5	OH	18	5	PA	17

Organizational Characteristics: Locations

Community Locations

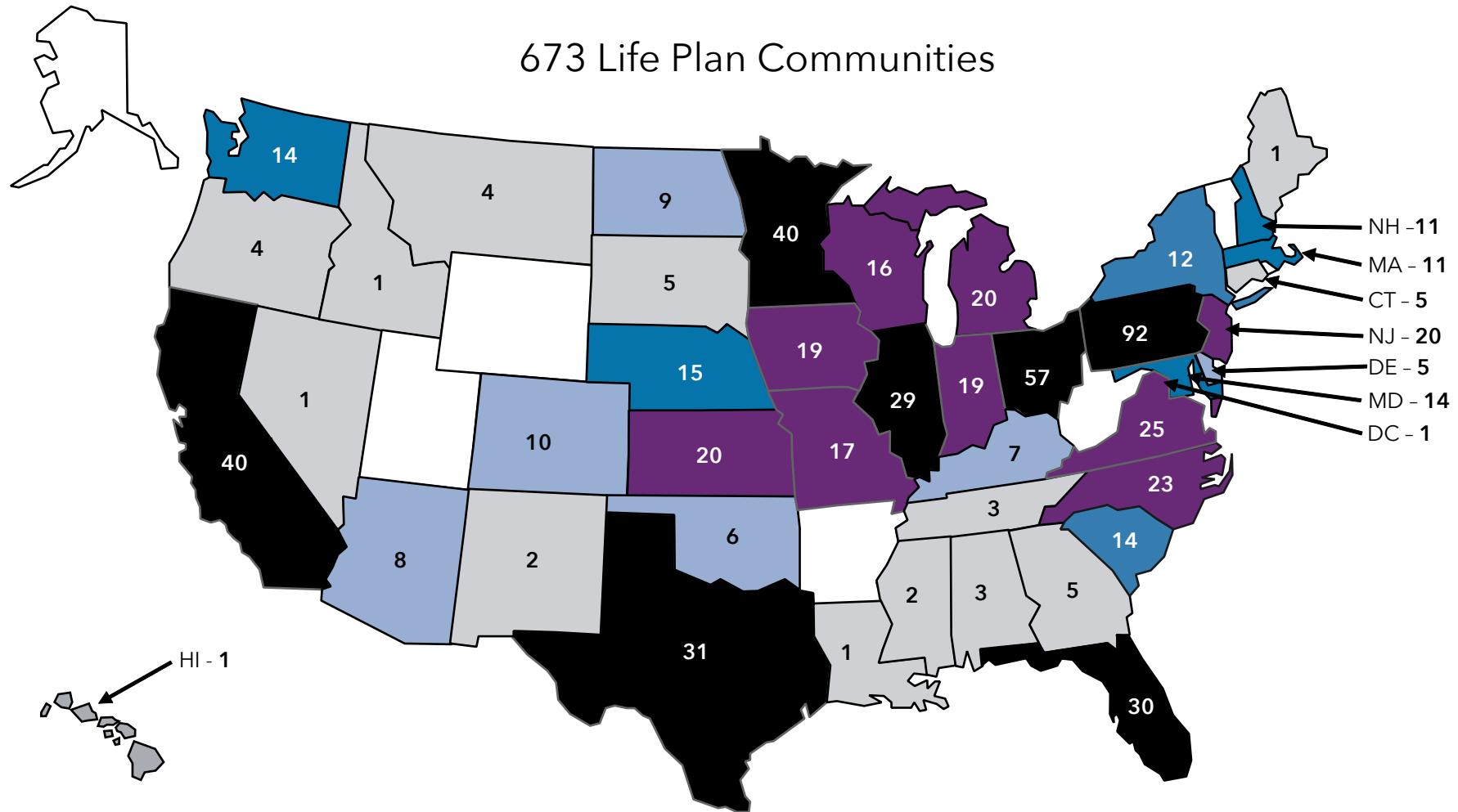


KEY:

	1 to 25 LZ 200 Communities
	26 to 50 LZ 200 Communities
	51 to 75 LZ 200 Communities
	76 to 100 LZ 200 Communities
	Over 100 LZ 200 Communities
	None

Organizational Characteristics: Locations

Life Plan Community (LPC) Locations



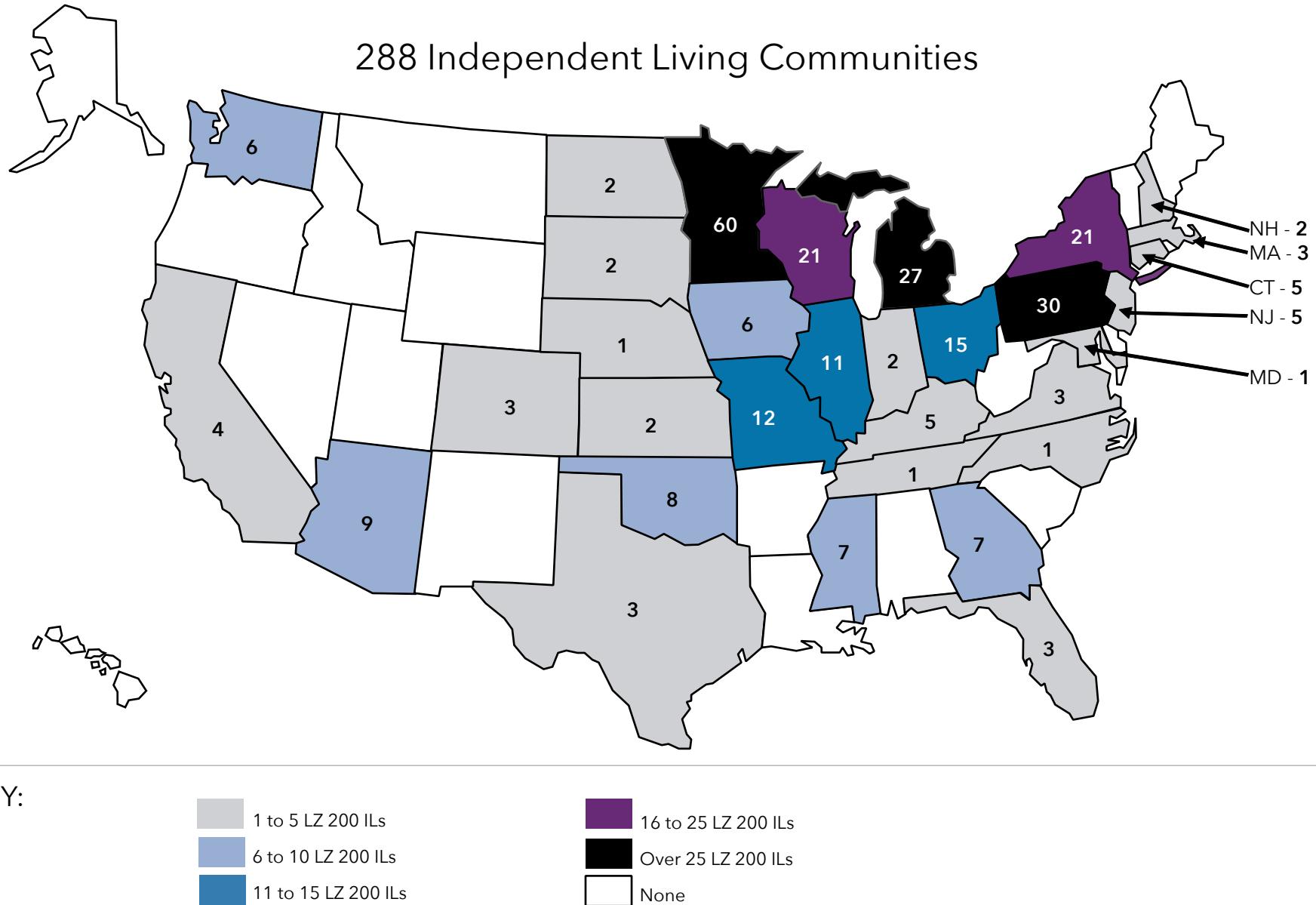
KEY:

- 1 to 5 LZ 200 LPCs
- 6 to 10 LZ 200 LPCs
- 11 to 15 LZ 200 LPCs

- 16 to 25 LZ 200 LPCs
- Over 25 LZ 200 LPCs
- None

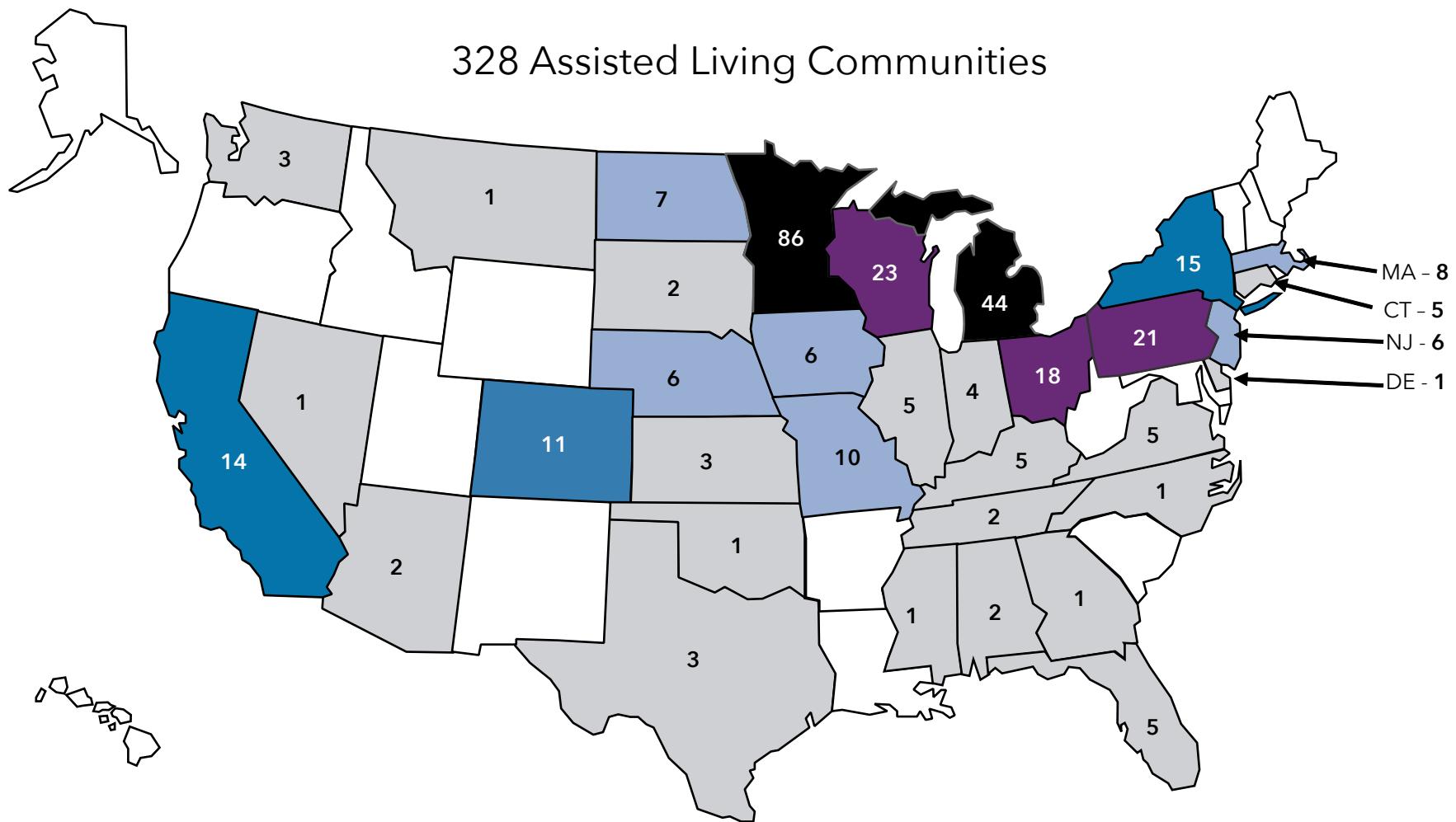
Organizational Characteristics: Locations

Independent Living (IL) Community Locations



Organizational Characteristics: Locations

Assisted Living (AL) Community Locations



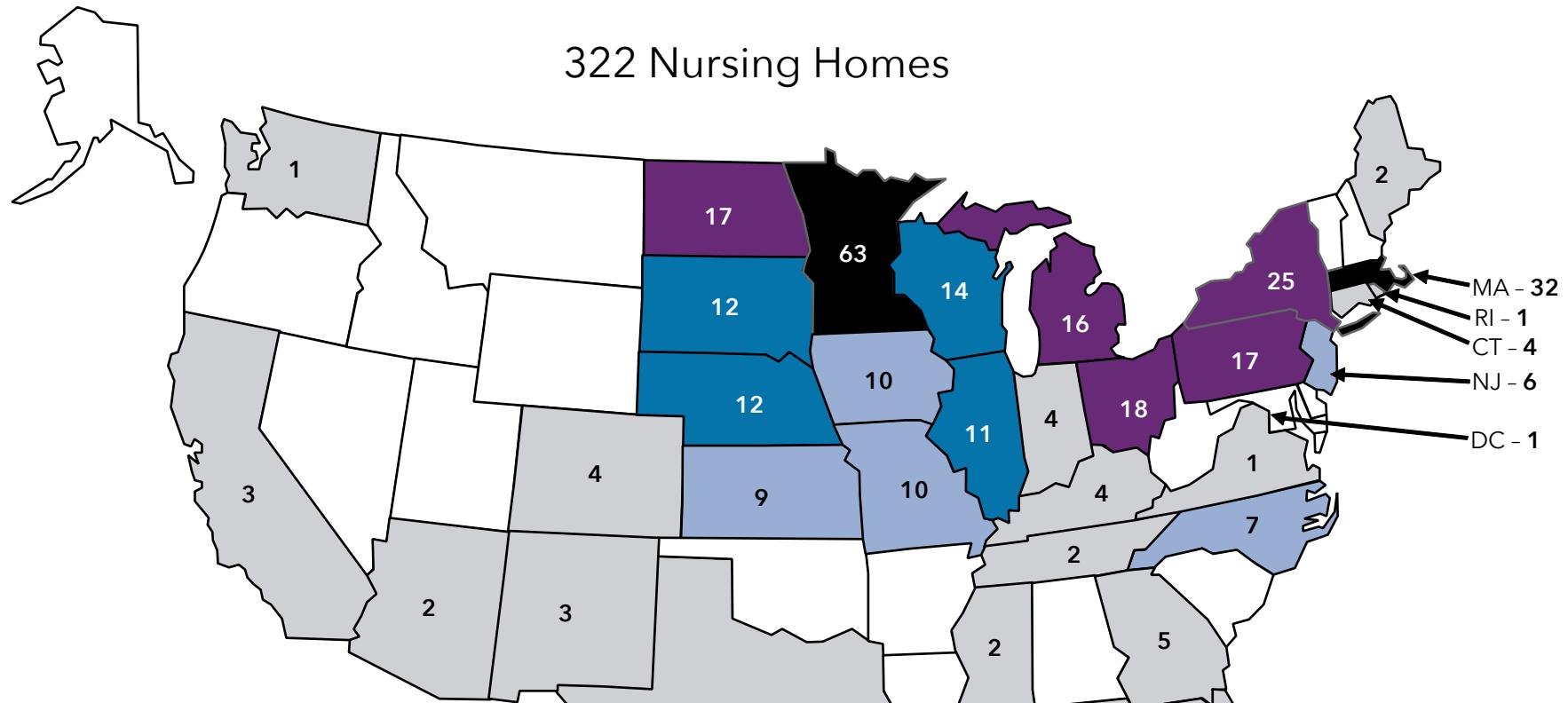
KEY:

1 to 5 LZ 200 ALs
6 to 10 LZ 200 ALs
11 to 15 LZ 200 ALs

16 to 25 LZ 200 ALs
Over 25 LZ 200 ALs
None

Organizational Characteristics: Locations

Nursing Home (NH) Locations



KEY:

- 1 to 5 LZ 200 NHs
- 6 to 10 LZ 200 NHs
- 11 to 15 LZ 200 NHs

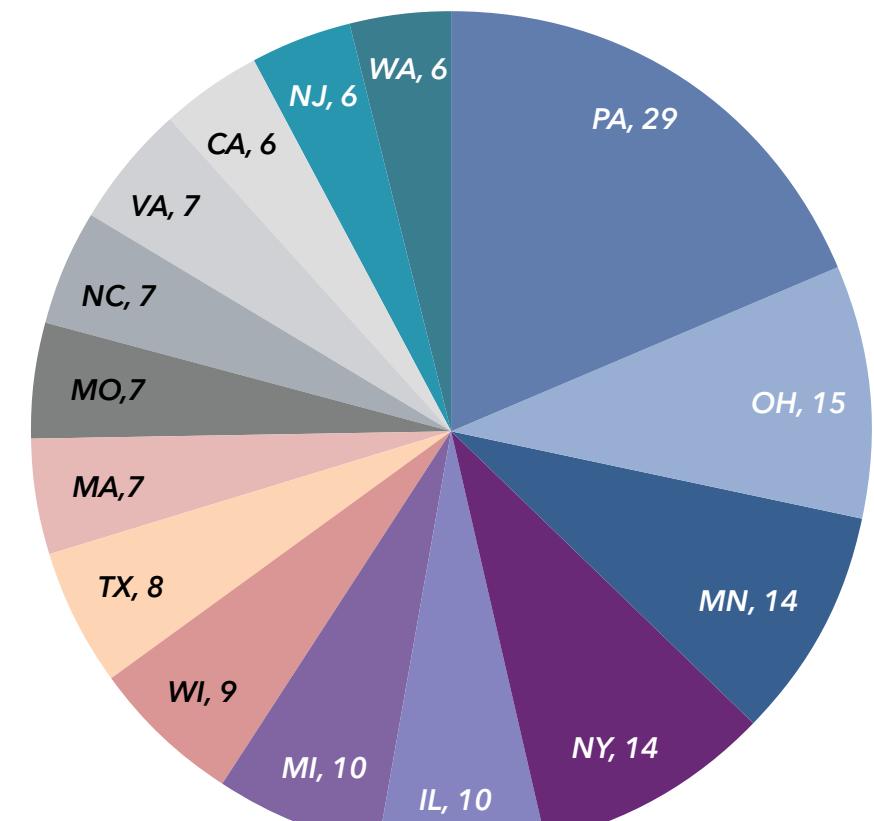
- 16 to 25 LZ 200 NHs
- Over 25 LZ 200 NHs
- None

Organizational Characteristics: System Headquarters

States with Largest Number of Headquarters' Locations

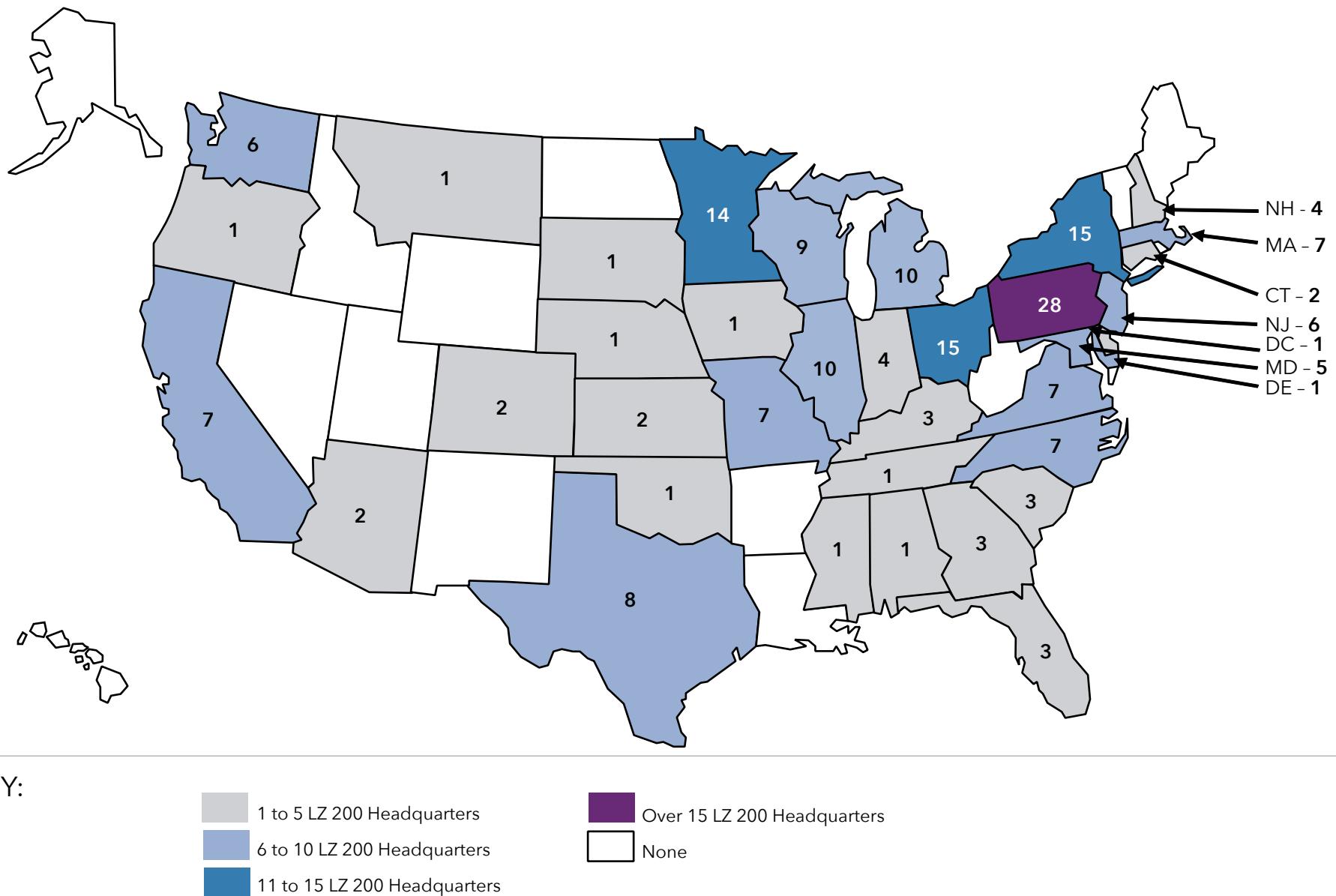
System Headquarters

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



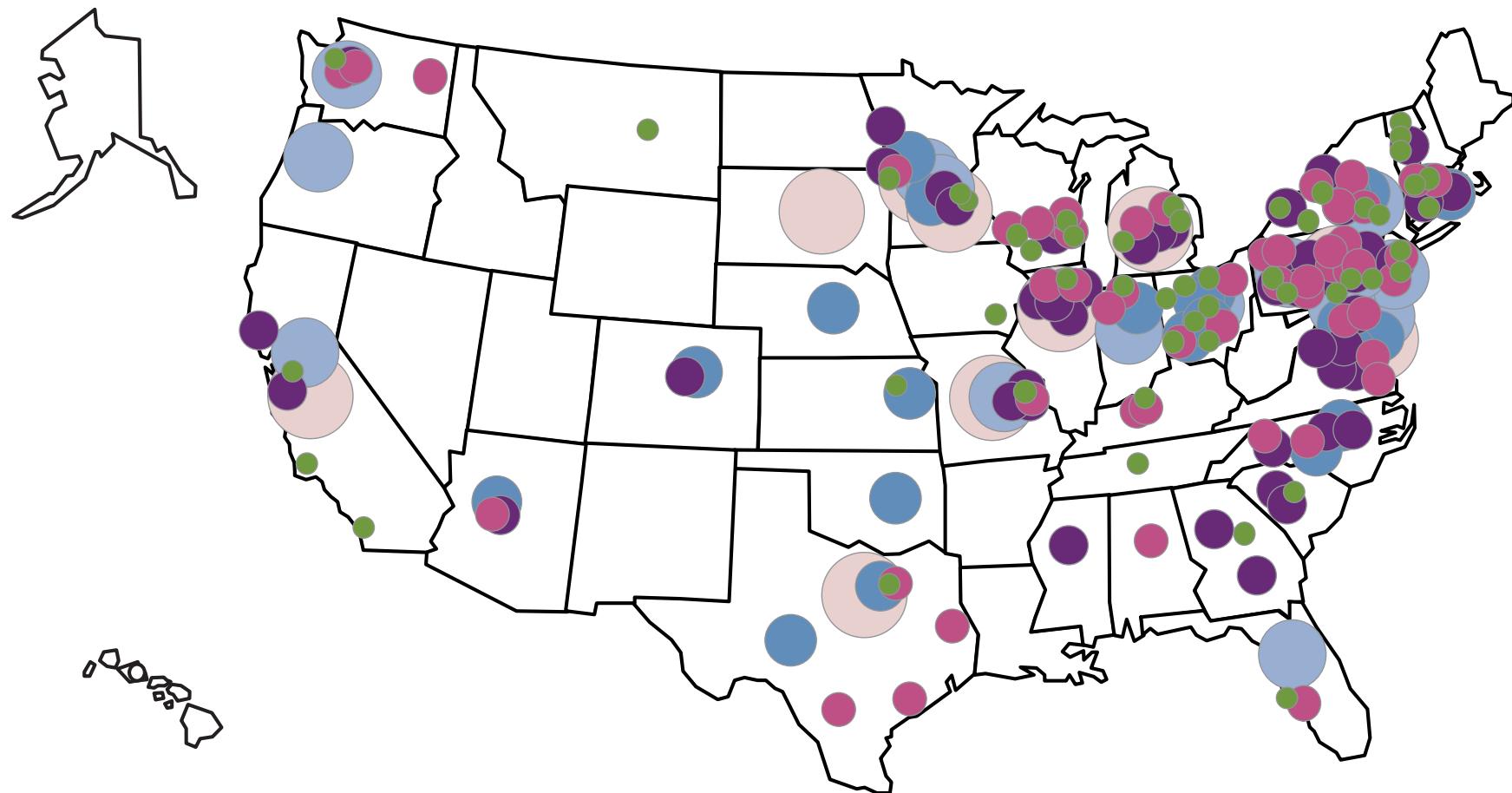
Organizational Characteristics: System Headquarters

Headquarters' Locations

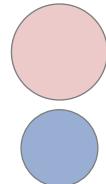


Organizational Characteristics: System Headquarters

Headquarters' Locations by Size



KEY:



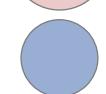
2,532+ Units (Largest 25)



1,540+ Units (Largest 50)



594+ Units (Largest 150)



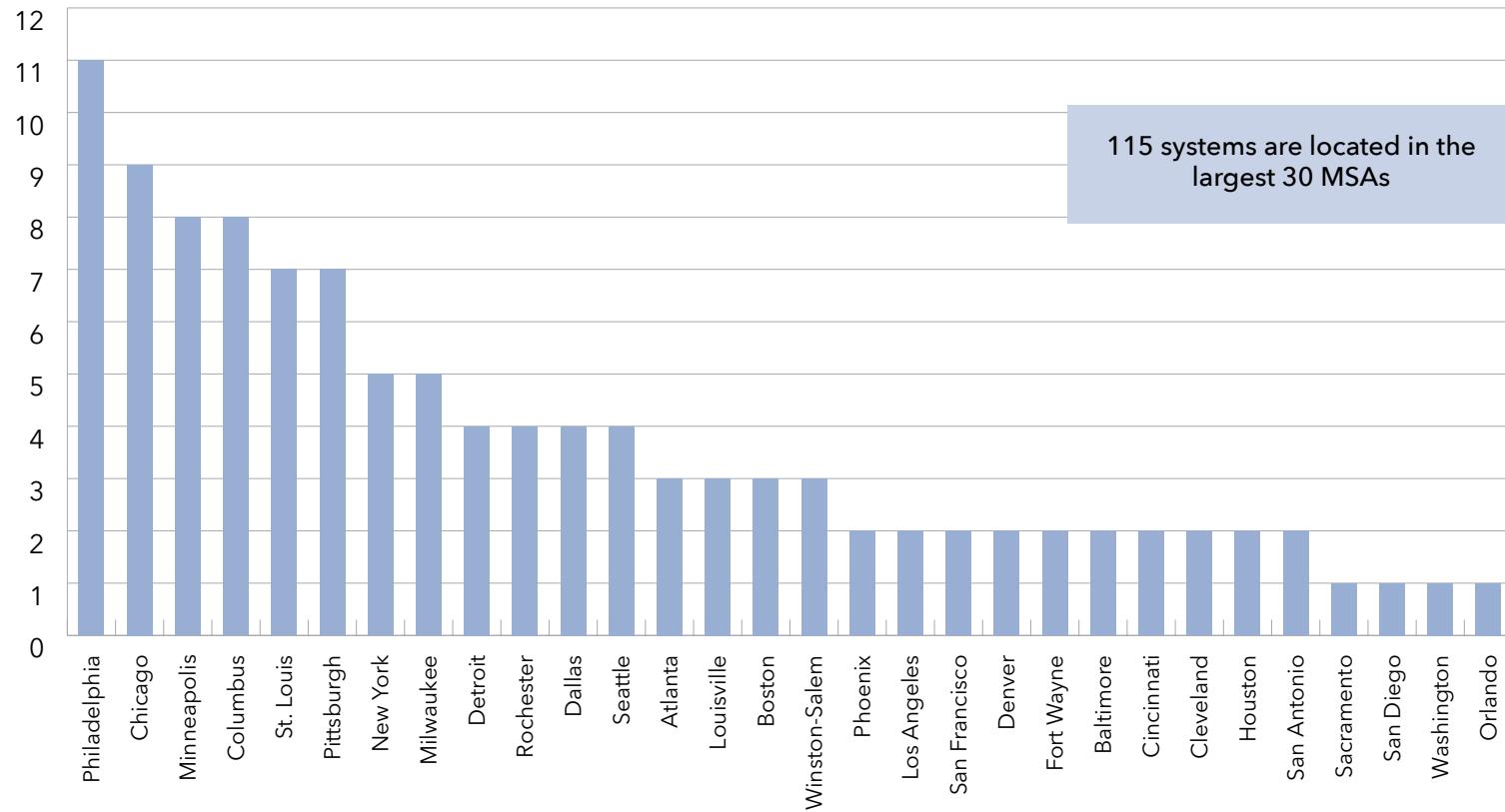
934+ Units (Largest 100)



371+ Units (Largest 200)

Organizational Characteristics: Metropolitan Statistical Areas (MSAs)

Number of Headquarters Located in the Largest 30 MSAs



Metropolitan Statistical Areas (MSAs)

Metropolitan Statistical Areas (MSAs) are defined by the Office of Management and Budget (OMB) for purposes of tabulating statistics on clearly defined metropolitan boundaries. These boundaries are based on 2024 data from the U.S. Census Bureau. Areas are identified by county, with several counties making up a MSA. The locations of the communities owned by LZ 200 organizations in the largest 30 MSAs are charted, showing the number and type of communities within each of the MSAs.

Organizational Characteristics: Geographic Classifications

Classifications

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

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

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

systems focus their operations either west or east of the Mississippi River or Rocky Mountains. A few of the national systems have an abundance of properties broadly scattered across the country, for example: Pacific Retirement Services, Inc. (LZ 200 #12) – a national system with a disparate geographic distribution of its communities with locations primarily on the West Coast, but two communities in Wisconsin, two in New Mexico and one in Texas. Covenant Living Communities & Services (LZ 200 #7) is a national system with communities in multiple states across the country.

- **Across States.** Systems whose communities are located among multiple states, primarily in one region of the United States. Example: Acts Retirement-Life Communities (LZ 200 #3) is classified as an across states system with a focus in the Northeast, Mid-Atlantic and Southeast U.S. Another example: Lifespace Communities (LZ 200 #8) is classified as a across states system where its focus had been on the Midwest, Northeast and Southeast until their affiliations in the Southwest.

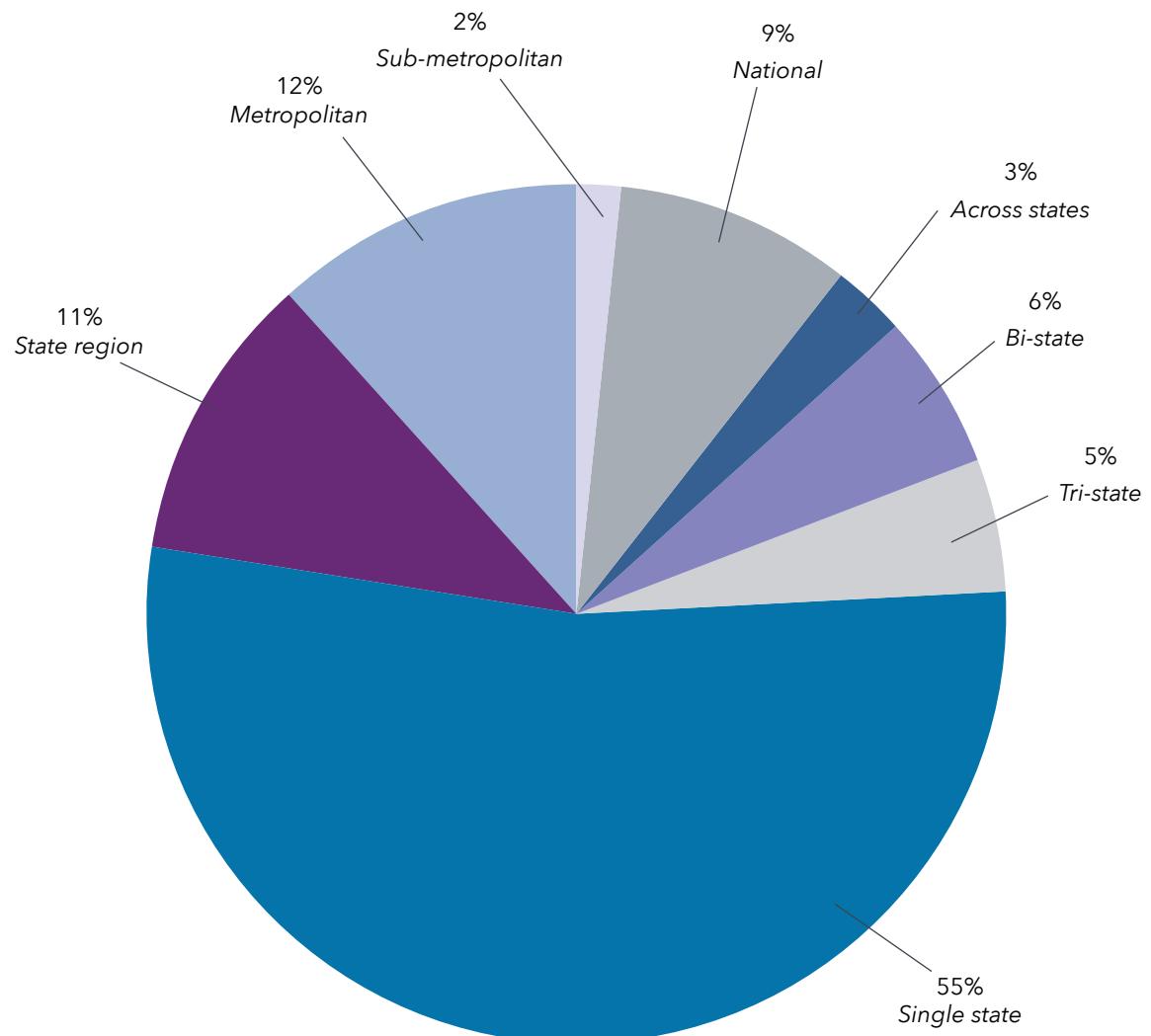
Organizational Characteristics: Geographic Classifications (Continued)

- **Tri-state.** Systems whose communities are located across three states, typically contiguous. Example: BHI Senior Living's (LZ 200 #20) sole focus was Indiana until their recent affiliations expanding them into Michigan and Ohio. Another example: EverTrue fka Lutheran Senior Services (LZ 200 #14) was previously classified as a Bi-state with its focus mainly in the Midwest until their acquisition of Diakon Lutheran Social Ministries in Pennsylvania.
- **Bi-state.** Systems whose communities are located across two states, typically contiguous. Example: Springpoint (LZ 200 #24) had all of its communities within New Jersey until 2017 when it affiliated with a Delaware community whereby changing it to a Bi-state designation.
- **Single State.** Systems whose communities are contained within a single state's borders and are spread across the state. Example: Westminster Communities of Florida (LZ 200 #13)—multiple communities within Florida, spread across the state (from central Florida to north central Florida, east and west).
- **State Region.** Systems whose communities are contained within a single region within a single state's borders. Example: Methodist Retirement Communities (LZ 200 #48)—multiple communities centrally concentrated in Texas.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: Episcopal SeniorLife Communities (LZ 200 #126)—multiple communities throughout the greater Rochester, New York area.
- **Sub-metropolitan.** Systems whose communities are contained within a sub-section of a metropolitan area. The larger the metropolitan area, the more likely the possibility that a multi-site may emerge within a sub-metropolitan area. Example: The communities of Goodwin Living (LZ 200 #91) are in the southwestern quadrant of the DC-Arlington metropolitan area.

Organizational Characteristics: Geographic Classifications

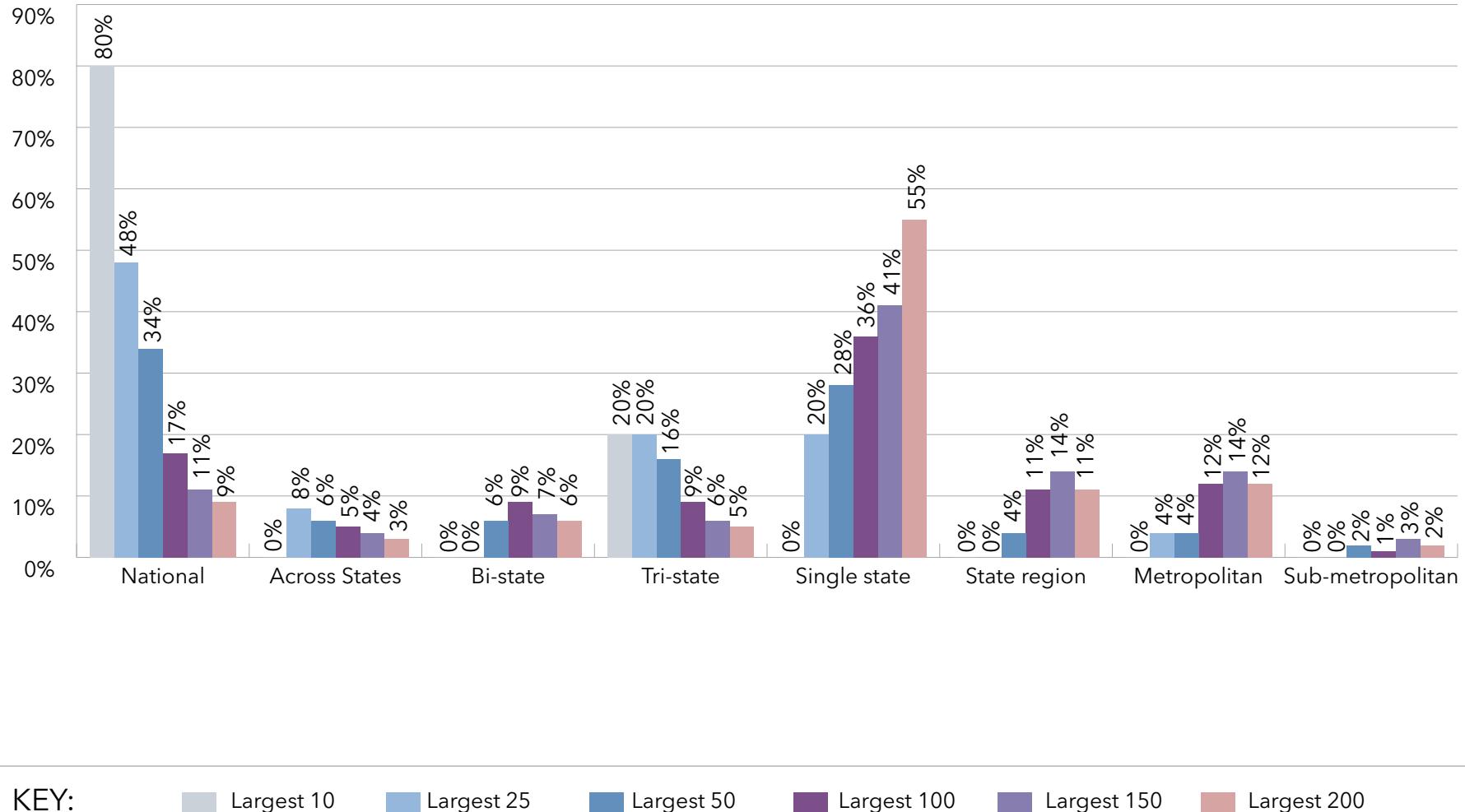
Primary Classifications

Chart 4-6a shows that a large majority (55%) of the LZ 200 organizations operate within a single state's boundaries (Single State, State Region, Metropolitan or Sub-metropolitan). Generally, a multi-site moves gradually from single-state, to bi-state, to tri-state, and then to a national multi-site. For example, Augustana Care Corporation operated in the Minneapolis area for most of its existence. In the 2000s, it added communities in other areas of Minnesota. In 2011, it expanded to Colorado; and in 2018 affiliated with Elim Care (MN) (who operates in Minnesota and North Dakota), to become Cassia (LZ 200 #15). National multi-sites are 9.0% of the LZ 200 and tend to be among the largest of the LZ 200 organizations; however, as noted earlier, a smaller percentage of these national multi-sites have communities that are broadly spread across the country.



Organizational Characteristics: Geographic Classifications

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



Analysis of the Data: Classifications

Secondary Classifications

A multi-site may have a secondary market, as well. For example, Tri-state multi-site EverTrue fka Lutheran Senior Services (LZ 200 #14) has a secondary metropolitan market in St. Louis. The secondary classification provides a snapshot of a system's geographic concentration of communities. More than 70 of the LZ 200 systems have such a market concentration. (Chart 4-6c).

Primary Classification	Secondary Classification	# Organizations
National	Across states	7
	Bi-state	1
	Single state	3
Across states	Single state	1
	Tri-State	1
	Metropolitan	2
Tri-state	Single state	4
	Metropolitan	3
Bi-state	Single state	2
	State region	2
	Metropolitan	3
	Sub-metropolitan	1
Single-state	State region	17
	Metropolitan	14
	Sub-metropolitan	1
State region	Metropolitan	5
	Sub-metropolitan	1
Metropolitan	Sub-metropolitan	2
Sub-metropolitan	State region	1
Total Organizations with Secondary Classifications		71

Organizational Characteristics: Corporate Name Changes in 2024

An ongoing trend among senior living organizations throughout the country, is that of changing the name of the organization to better reflect the services provided. Section 4-7 lists the 2024 name changes.

2025 Rank	Current System Name	Logo	Previous System Name
14	EverTrue	 EVERTRUE	Lutheran Senior Services
36	Kintura	 Kintura LIVING. LIFE. WELL.	Brightspire & Well-Spring Group
50	Vivie	 Vivie	Knute Nelson & Walker Methodist
57	Presbyterian Living	 Presbyterian Living PEOPLE. PURPOSE.	Presbyterian Homes, Inc.
92	Tandem Living	 TANDEM LIVING	Mennonite Home Communities
124	Unitas Communities	 Unitas COMMUNITIES BETTER LIVING SOLUTIONS	Morningstar Living & Moravian Manor
127	The Ohio Masonic Communities	 THE OHIO MASONIC COMMUNITIES	The Ohio Masonic Home
198	Trinity Senior Services	 trinity SENIOR SERVICES Better Together	Milwaukee Catholic Home & Trinity Woods

Organizational Characteristics: Debt Ratings

Rated Debt as of 12/31/2024

Ratings

There are currently two rating agencies that rate senior living debt: Fitch Ratings and Standard & Poor's. A listing of multi-site organizations with debt rated by Fitch Ratings or Standard & Poor's is shown in Chart 4-8a. A multi-site with an "NR" shown as an agency's rating means that the multi-site did not have its debt rated by that agency as of 12/31/24. Sixty (60) of the LZ 200, including one of the Over 200, organizations have outstanding debt rated by Fitch Ratings and/or Standard & Poor's. Chart 4-8b presents the categories of each of the ratings, showing that the majority, 48%, of the ratings for LZ 200 organizations fall in the "BBB" category (that is, with ratings of "BBB+," "BBB" or "BBB-").

2025 Rank	System Name	State	Rated	
			Fitch	S&P
49	Immanuel	NE	AA	UNR
16	Concordia Lutheran Ministries	PA	UNR	AA-
106	Moorings Park	FL	A	A+
11	Front Porch Communities and Services	CA	A	A
35	Buckner Retirement Services, Inc	TX	A	UNR
6	HumanGood	CA	A	UNR
1	National Senior Communities	VA	A	UNR
25	Masonic Villages	PA	UNR	A
17	Otterbein SeniorLife	OH	UNR	A
33	Willow Valley Communities	PA	A	UNR
3	Acts Retirement-Services, Inc.	PA	A-	UNR
7	Covenant Retirement Communities	IL	A-	UNR
131	Emerald Communities	WA	A-	UNR
154	Episcopal Communities & Services for Seniors	CA	A-	UNR
97	Givens Estates	NC	A-	UNR

Organizational Characteristics: Debt Ratings (Continued)

Rated Debt as of 12/31/2024

2025 Rank	System Name	State	Rated	
			Fitch	S&P
38	Masonicare	CT	A-	UNR
58	Presbyterian Living fka Presbyterian Homes	IL	A-	UNR
59	Sun Health	AZ	A-	UNR
13	Westminster Communities of Florida	FL	A-	UNR
37	Kintura fka Brightspire	NC	BBB+	UNR
143	Community First Solutions	OH	BBB+	UNR
18	Presbyterian Senior Living	PA	BBB+	UNR
24	Springpoint Senior Living	NJ	BBB+	UNR
123	Sunnyside Presbyterian Home	VA	BBB+	UNR
23	The Carmelite System	NY	BBB+	UNR
21	Asbury Communities, Inc.	MD	BBB	UNR
52	Bethesda Health Group	MO	BBB	UNR
20	BHI Senior Living, Inc.	IN	BBB	UNR
45	Franciscan Communities, Inc.	IL	BBB	UNR
6	HumanGood	PA	BBB	UNR
8	Lifespace Communities, Inc.	IA	BBB	UNR
57	Lifespire of Virginia	VA	BBB	UNR
14	EverTrue fka Lutheran Senior Services	MO	BBB	UNR
39	Lutheran Services Carolinas	NC	BBB	UNR
88	The United Methodist Retirement Homes, Inc.	NC	BBB	UNR
80	Eskaton	CA	UNR	BBB
177	The Loomis Communities Inc.	MA	UNR	BBB
84	Brio Living Services	MI	BBB-	UNR
61	EveryAge	NC	BBB-	UNR

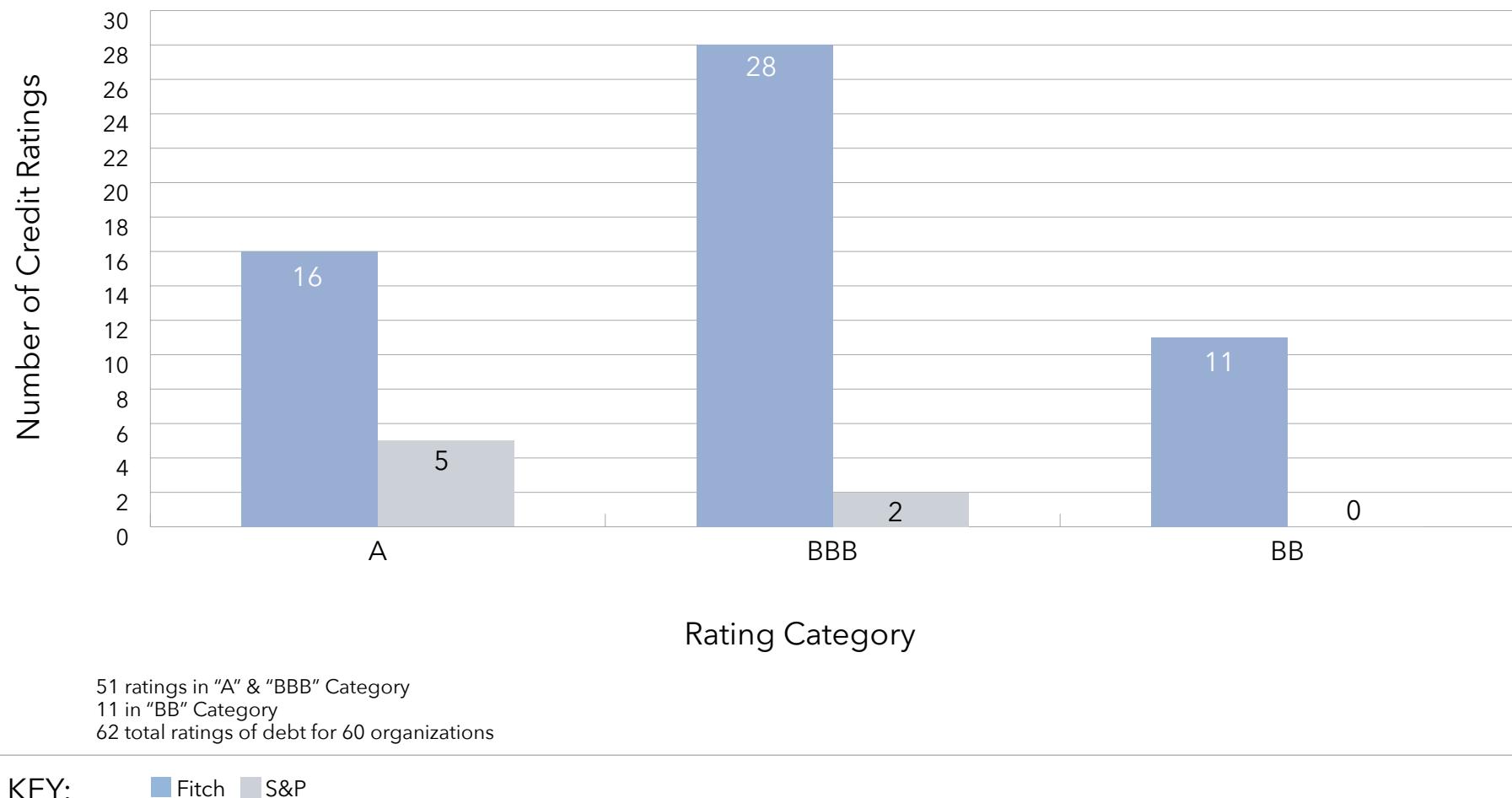
Organizational Characteristics: Debt Ratings (Continued)

Rated Debt as of 12/31/2024

2025 Rank	System Name	State	Rated	
			Fitch	S&P
144	Friends Homes, Inc.	NC	BBB-	UNR
79	Garden Spot Communities	PA	BBB-	UNR
36	Greencroft Communities	IN	BBB-	UNR
69	Holland Home	MI	BBB-	UNR
171	Judson Services	OH	BBB-	UNR
109	Landis Communities	PA	BBB-	UNR
46	Life Enriching Communities	OH	BBB-	UNR
125	Messiah Lifeways	PA	BBB-	UNR
26	Ohio Living Communities	OH	BBB-	UNR
Over 200	Three Pillars Senior Living Community	WI	BBB-	UNR
105	Blue Skies of Texas	TX	BB+	UNR
135	Brazos Presbyterian Homes	TX	BB+	UNR
148	Eliza Jennings Senior Care Network	OH	BB+	UNR
75	Friendship Village of St. Louis	MO	BB+	UNR
119	Westminster-Canterbury on Chesapeake Bay	VA	BB+	UNR
149	Morningside Ministries	TX	BB	UNR
124	Unitas fka Morningstar Living	PA	BB	UNR
19	Transforming Age	WA	BB	UNR
67	Wesley Enhanced Living	PA	BB	UNR
54	Wesley Woods	GA	BB	UNR
55	Presbyterian Villages of Michigan	MI	BB-	UNR

Organizational Characteristics: Debt Ratings

Ratings by Category



Analysis of the Data: Revenue

Annual Revenue by Organization

Revenues

Several years ago, the LZ 200 publication began capturing the type of revenue generated by each respective organization. As an additional means of evaluating the size of each organization, in addition to the total number of units and communities, overall revenue was also surveyed. Most of the organizations provided this information. To avoid detailing each organization's total revenue for fiscal year 2024, organizations were grouped into tiers based on their overall revenue. The largest LZ 200 organizations have revenues beyond \$200 million (30 organizations). The largest number of LZ 200 organizations fall within the Tier III category, which reflects annual revenue between \$50 million and \$99 million. Section 4-9 details the revenue statistics. It should be noted that revenue figures included in the report are taken directly from survey responses and are not independently verified.

	Number of LZ 200 Organizations	% of Total LZ 200
Tier I: > \$200 million	30	21%
Tier II: \$100-\$199 million	33	23%
Tier III: \$50-\$99 million	50	34%
Tier IV: \$25-\$49 million	30	21%
Tier V: < \$25 million	2	1%
n = 145		

Analysis of the Data: Revenue

Annual Revenue by Organization

2025 Rank	System	State	Annual Revenue Tier
9	Trinity Health Senior Communities	MI	Tier I
1	National Senior Communities	DC	Tier I
43	Covenant Health	MA	Tier I
3	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	Tier I
6	HumanGood	CA	Tier I
4	Presbyterian Homes & Services	MN	Tier I
10	Benedictine	MN	Tier I
8	Lifespace Communities, Inc.	TX	Tier I
7	Covenant Living Communities and Services	IL	Tier I
31	National Church Residences	OH	Tier I
15	Cassia	MN	Tier I
18	Presbyterian Senior Living	PA	Tier I
54	Presbyterian Villages of Michigan	MI	Tier I
53	Hebrew SeniorLife	MA	Tier I
21	Asbury Communities, Inc.	MD	Tier I
14	EverTrue fka Lutheran Senior Services	MO	Tier I
23	The Carmelite System	NY	Tier I
13	Westminster Retirement Communities of Florida	FL	Tier I
17	Otterbein SeniorLife	OH	Tier I
16	Concordia Lutheran Ministries	PA	Tier I
24	Springpoint Senior Living, Inc.	NJ	Tier I
19	Transforming Age	WA	Tier I
27	The Kendal Corporation	DE	Tier I
20	BHI Senior Living, Inc.	IN	Tier I
38	Masonicare	CT	Tier I
26	Ohio Living Communities	OH	Tier I

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million; Tier V: < \$25 Million

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

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2025 Rank	System	State	Annual Revenue Tier
22	Ecumen	MN	Tier I
25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	Tier I
39	Lutheran Services Carolinas	NC	Tier I
69	Holland Home	MI	Tier I
41	ArchCare	NY	Tier II
84	Brio Living Services	MI	Tier II
40	Eventide and Tabitha	MN	Tier II
106	Moorings Park	FL	Tier II
51	St. Francis Health Services of Morris, Inc.	MN	Tier II
89	Sequoia Living, Inc.	CA	Tier II
50	Vivie fka KNWM (Knute Nelson / Walker Methodist)	MN	Tier II
58	Presbyterian Living fka Presbyterian Homes, Inc.	IL	Tier II
37	Kintura fka Brightspire and Well-Spring Group	NC	Tier II
59	Sun Health	AZ	Tier II
117	Ascentria Care Alliance	MA	Tier II
30	Presbyterian Manors of Mid-America, Inc.	KS	Tier II
46	Life Enriching Communities	OH	Tier II
86	Lutheran SeniorLife	PA	Tier II
60	Presbyterian SeniorCare Network	PA	Tier II
91	Goodwin Living	VA	Tier II
63	Phoebe Ministries	PA	Tier II
34	Homewood Retirement Centers, Inc.	MD	Tier II
57	LifeSpire of Virginia	VA	Tier II
56	FellowshipLIFE, Inc.	NJ	Tier II
107	Alliance Health & Human Services	MA	Tier II
79	Eskaton	CA	Tier II

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

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

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2025 Rank	System	State	Annual Revenue Tier
47	United Church Homes, Inc.	OH	Tier II
48	Methodist Retirement Communities	TX	Tier II
61	EveryAge	NC	Tier II
81	Ingleside	MD	Tier II
138	Ebenezer Society	MN	Tier II
104	Christian Health Care Center	NJ	Tier II
52	Bethesda Health Group, Inc.	MO	Tier II
73	Illuminus, Inc.	WI	Tier II
85	Pinnacle Living	VA	Tier II
28	Bethesda Senior Living Communities	CO	Tier II
97	Givens Communities	NC	Tier II
88	The United Methodist Retirement Homes, Inc.	NC	Tier III
121	St. Ann's Community	NY	Tier III
98	Lutheran Life Communities	IL	Tier III
87	Saint Therese	MN	Tier III
72	Lutheran Homes of South Carolina Inc.	SC	Tier III
74	Wesley	WA	Tier III
110	United Methodist Communities	NJ	Tier III
75	Friendship Villages of St. Louis	MO	Tier III
101	National Lutheran Communities and Services	MD	Tier III
100	Christian Living Communities	CO	Tier III
67	Wesley Enhanced Living	PA	Tier III
95	The RiverWoods Group	NH	Tier III
64	Friendship	VA	Tier III
90	Felician Services Inc.	IL	Tier III
120	Westminster-Canterbury on Chesapeake Bay	VA	Tier III

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million

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

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2025 Rank	System	State	Annual Revenue Tier
112	HutsonWood	TN	Tier III
93	Presbyterian Communities of South Carolina	SC	Tier III
80	Garden Spot Communities	PA	Tier III
156	Episcopal Communities & Services for Seniors	CA	Tier III
32	Christian Care Companies	AZ	Tier III
66	Presbyterian Homes of Georgia, Inc.	GA	Tier III
77	Mather	IL	Tier III
94	Providence Life Services	IL	Tier III
55	Mississippi Methodist Senior Services, Inc.	MS	Tier III
126	Unitas Communities fka Morningstar Living / Moravian Manor Communities	PA	Tier III
114	Forefront Living	TX	Tier III
158	The Legacy Senior Communities	TX	Tier III
144	Community First Solutions	OH	Tier III
83	United Methodist Homes	NY	Tier III
78	Community Wellness Partners	NY	Tier III
42	Baptist Village Communities	OK	Tier III
92	Tandem Living fka Mennonite Home Communities	PA	Tier III
160	Sholom Community Alliance	MN	Tier III
134	Christian Care Communities	KY	Tier III
108	Menno Haven, Inc.	PA	Tier III
105	Blue Skies of Texas	TX	Tier III
133	Masonic Homes of Kentucky, Inc	KY	Tier III
149	Eliza Jennings Senior Care Network	OH	Tier III
115	Living Branches	PA	Tier III
109	Landis Communities	PA	Tier III
140	Luthercare	PA	Tier III

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million

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

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2025 Rank	System	State	Annual Revenue Tier
124	Sunnyside Communities	VA	Tier III
99	Vista Prairie Communities	MN	Tier III
125	Messiah Lifeways	PA	Tier III
147	Smith Senior Living	IL	Tier III
127	Episcopal Seniorlife Communities	NY	Tier III
82	Baruch Senior Ministries	MI	Tier III
146	Rockwood Retirement Communities	WA	Tier III
162	Silverstone Living	NH	Tier III
194	Parker Health Group	NJ	Tier III
163	Bluestem Communities	KS	Tier IV
198	Canterbury Woods	NY	Tier IV
172	St. John's United	MT	Tier IV
151	ThriveMore	NC	Tier IV
130	Simpson Senior Services	PA	Tier IV
184	Guardian Angels Senior Services	MN	Tier IV
150	Morningside Ministries	TX	Tier IV
205	Genacross Lutheran Services	OH	Tier IV
128	Ohio Masonic Communities	OH	Tier IV
131	Bethany Lutheran Homes Inc	WI	Tier IV
175	Convivial Life, Inc.	FL	Tier IV
143	Lutheran Life Villages	IN	Tier IV
166	Redstone Presbyterian SeniorCare	PA	Tier IV
111	Wesley Willows	IL	Tier IV
135	Benevolent Corporation Cedar Community	WI	Tier IV
145	Friends Homes, Inc.	NC	Tier IV
174	The Village of St. Edward	OH	Tier IV

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million

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

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2025 Rank	System	State	Annual Revenue Tier
181	Resthaven	MI	Tier IV
157	Cardinal Ritter Senior Services	MO	Tier IV
177	Bethany St. Joseph Corporation	WI	Tier IV
195	Beechwood Continuing Care, Inc.	NY	Tier IV
189	Lutheran Home & Harwood Place	WI	Tier IV
152	Brethren Retirement Community	OH	Tier IV
137	Sunset Manor, Inc.	MI	Tier IV
179	The Loomis Communities, Inc.	MA	Tier IV
171	Medford Leas	NJ	Tier IV
191	Wesbury UMC	PA	Tier IV
139	Baptist Homes & Healthcare Ministries	MO	Tier IV
193	Jewish Senior Life of Metropolitain of Detroit	MI	Tier IV
197	Oaknoll	IA	Tier IV
190	Skaalen Retirement Services	WI	Tier V
70	American Baptist Homes of the Midwest	MN	Tier V

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million; Tier V: < \$25 Million

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

Analysis of the Data: Corporate Structure

Most Common Corporate Positions Created in 2024

Corporate Staff

Yet another area of the 2025 LZ 200 is an analysis of the corporate level staffing of select operating areas for the LZ 200 organizations (Charts 4-10a-c).

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

Positions Added	Number of LZ 200 Adding the Position
Chief of Resident Services/Healthcare	14
Chief Operations Officer	10
Director of Capital Projects/Development	9
Director of Community Support/Purposeful Living	9
Chief Information/Technology Officer	8
Director of Healthcare Marketing & Sales	6
Executive Director/Senior Vice President	5
Director of Talent/Recruiting/Human Resources	4
Compliance Officers	3
Chief Financial Officer/Accountant	3
Chief Clinical Services	2
Director of Strategic Initiatives	2
Legal Counsel	1

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

Analysis of the Data: Corporate Structure

Corporate Staffing Changes

2025 Rank	System Name	State	Current (YE 2024)	Previous
CEO				
4	Presbyterian Homes & Services	MN	Jon Fletcher	Dan Lindh
7	Covenant Living Communities and Services	IL	David Erickson	Terri Cunliffe
9	Trinity Health Senior Communities	MI	Daniel Drake	Jackie Harris
13	Westminster Retirement Communities of Florida	FL	Hank Keith	Terry Rogers
27	The Kendal Corporation	DE	Vassar Byrd	Amy Harrison
47	United Church Homes, Inc.	OH	Ken Young	Rev Kenneth Daniel
53	Hebrew SeniorLife	MA	Louis J. Woolf	Steve Landers
55	Mississippi Methodist Senior Services, Inc.	MS	Christie Vance	Steve McAlilly
94	Providence Life Services	IL	William DeYoung	Richard Schutt
104	Christian Health Care Center	NJ	Steve Dumke	Doug Struyk
159	Sholom Community Alliance	MN	Jim Newbrough	Barb Klick
175	Bethany St. Joseph Corporation	WI	Kimberly Gochanour	Craig Ubbelohde
CFO				
13	Westminster Retirement Communities of Florida	FL	Jennifer Martens	Hank Keith
53	Hebrew SeniorLife	MA	Mark Johnson	James Hart
54	Presbyterian Villages of Michigan	MI	Tyler Luce	Bruce Blalock
82	Baruch Senior Ministries	MI	Bob Spencer (Interim)	James Tew
142	Lutheran Life Villages	IN	Vacant	Donna Scanlon
149	Morningside Ministries	TX	Vacant	Myranda Prater
156	The Legacy Senior Communities	TX	Scott Snorton	Terry Purchal
173	Convivial Life, Inc.	FL	Jeffrey Dunkle	Charity Hathorne
175	Bethany St. Joseph Corporation	WI	Michelle White	Matthew Muellenberg
188	Skaalen Retirement Services	WI	Jackie Carley	Deb Pundt
191	Jewish Senior Life of Metropolitan of Detroit	MI	Julie Wiewiora	Kara Powers

Analysis of the Data: Corporate Structure (Continued)

Corporate Staffing Changes

2025 Rank	System Name	State	Current (YE 2024)	Previous
COO				
7	Covenant Living Communities and Services	IL	Darrell Baltimore	Vacant
55	Mississippi Methodist Senior Services, Inc.	MS	Vacant	Christie Vance
63	Phoebe Ministries	PA	Jason Shott	Robert Richards
80	Eskaton	CA	Vacant	Scott Winans
94	Providence Life Services	IL	Vacant	William DeYoung
CIO/CTO				
18	Presbyterian Senior Living	PA	Gregory Day	Bruce Shearer
50	Vivie fka Knute Nelson/Walker Methodist	MN	Jamie Loken	Erik Lindwall
57	LifeSpire of Virginia	VA	Kim Miller	Robert Wilbanks
84	Brio Living Services	MI	Marcus Brian	Hal Gilwreath
89	Sequoia Living, Inc.	CA	Michael Skaff	Steve Hieger
192	Parker Health Group	NJ	Robert Mosquera	Jim Dellapa

Analysis of the Data: Corporate Structure

Corporate Tenure

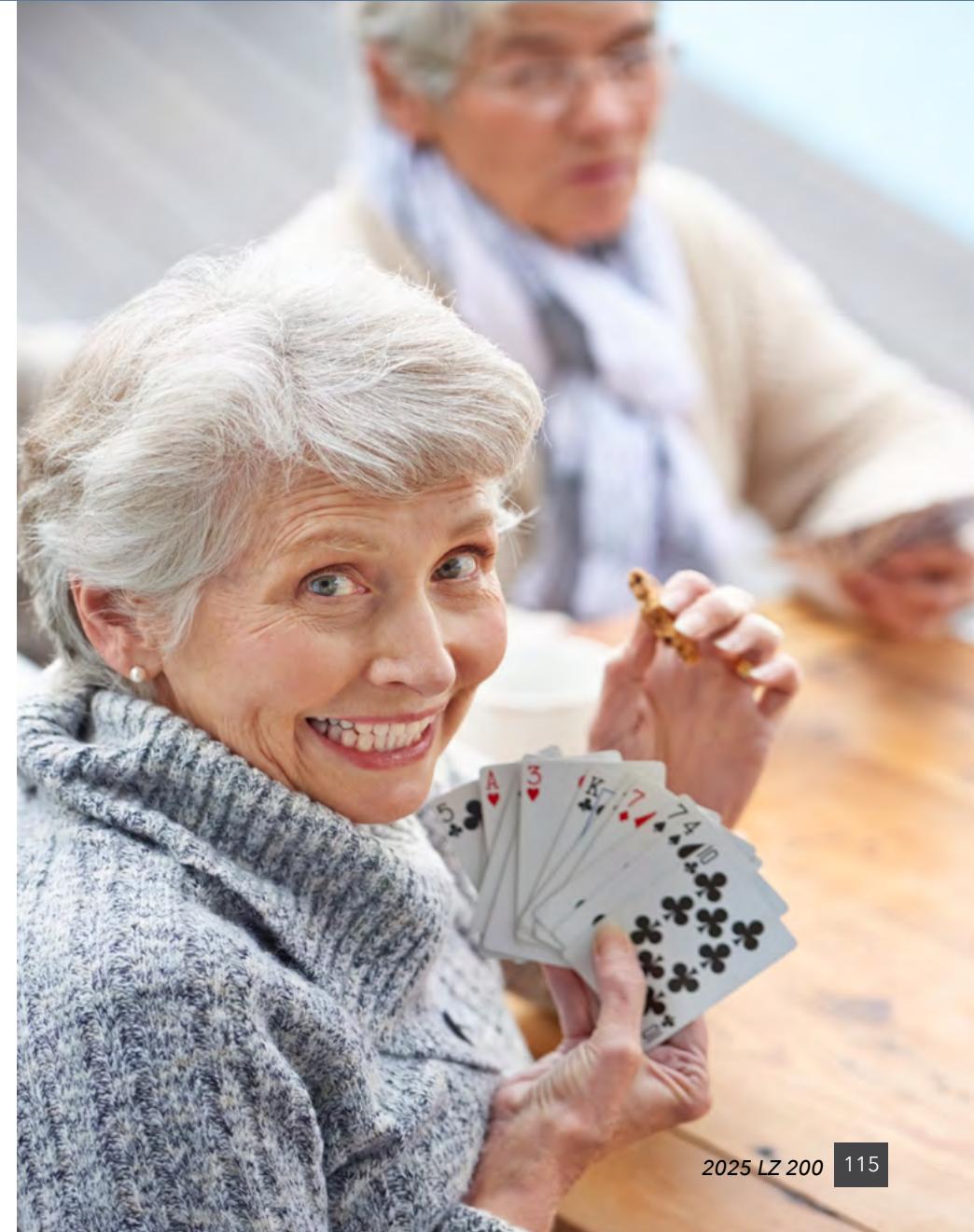
Position	Average Tenure (years)	n*
CEO	15.00	144
CFO	10.00	130
COO	11.00	88
CIO	9.00	78

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

Organizational Characteristics: Accreditation Accredited Communities

Accreditation

For senior living organizations, accreditation may be sought through several accrediting bodies (Charts 4-11a-b). The listing of LZ 200 with organizations that have obtained CARF (Commission on Accreditation of Rehabilitation Facilities), JCAHO (Joint Commission on the Accreditation of Healthcare Organizations), or EAGLE (Educational Assessment Guidelines Leading toward Excellence) accreditation is shown in Chart 4-11a-b. A total of 83 communities within the LZ 200 are accredited through CARF; 28 have sought accreditation through JCAHO, and an additional 47 are accredited through EAGLE.



Organizational Characteristics: Accreditation

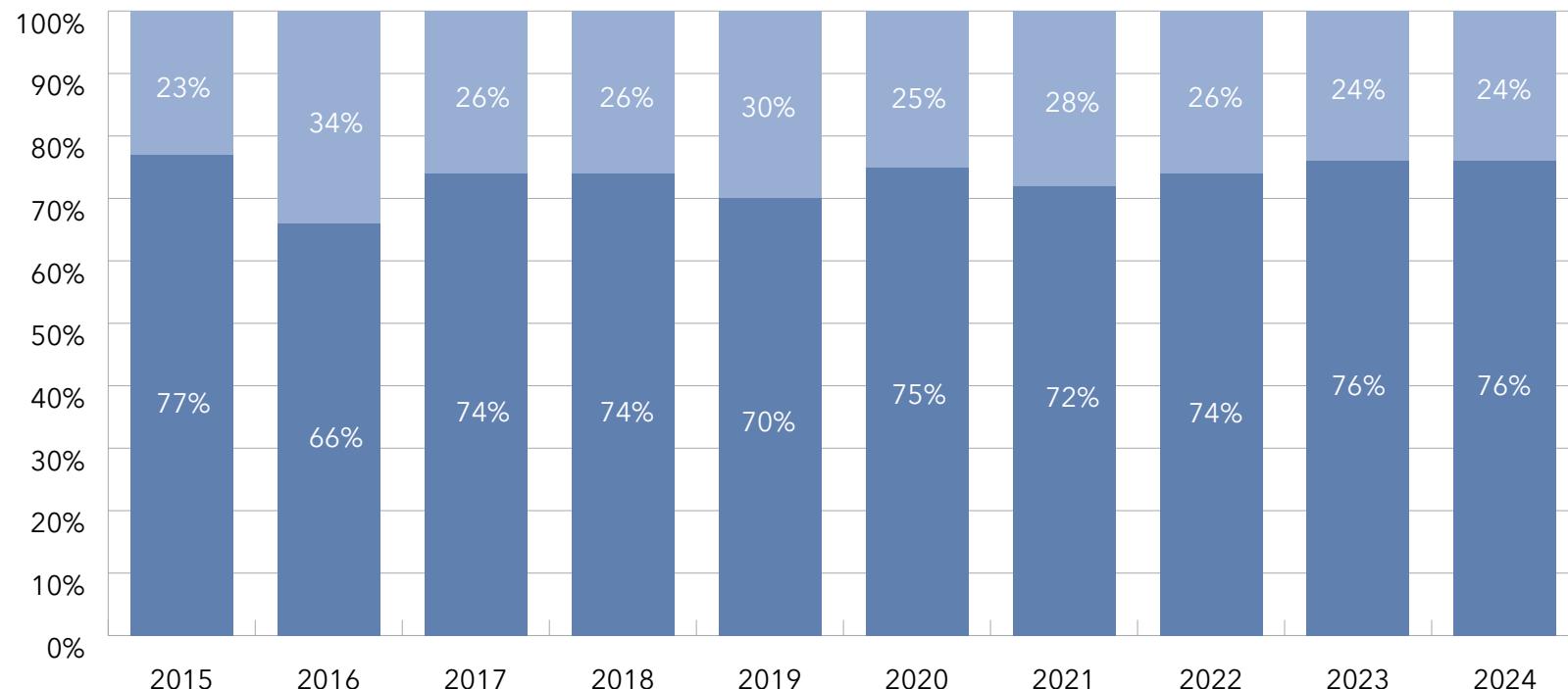
Accredited Communities

2025 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
25	Concordia Lutheran Ministries	PA	21	0	0
24	Presbyterian Senior Living	PA	16	0	0
23	National Church Residences	OH	11	0	0
22	Pinnacle Living	VA	4	0	0
18	The Kendal Corporation	DE	3	1	0
19	Ingleside	MD	3	0	0
20	Redstone Presbyterian SeniorCare	PA	3	0	0
21	The Loomis Communities, Inc.	MA	3	0	0
14	Blue Skies of Texas	TX	2	1	0
15	Rockwood Retirement Communities	WA	2	0	2
12	Hebrew SeniorLife	MA	2	0	0
13	Givens Communities	NC	2	0	0
16	Medford Leas	NJ	2	0	0
17	Canterbury Woods	NY	2	0	0
5	Covenant Health	MA	1	1	0
6	Presbyterian SeniorCare Network	PA	1	0	0
7	The RiverWoods Group	NH	1	0	0
8	Moorings Park	FL	1	0	0

2025 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
9	Landis Communities	PA	1	0	0
10	Westminster-Canterbury on Chesapeake Bay	VA	1	0	0
11	Masonicare	CT	1	0	0
141	Alliance Health & Human Services	MA	0	7	0
140	Providence Life Services	IL	0	4	0
143	Ascentria Care Alliance	MA	0	3	0
3	The Village of St. Edward	OH	0	1	0
135	The Carmelite System	NY	0	1	0
136	Masonic Villages of the Grand Lodge of Pennsylvania	PA	0	1	0
137	ArchCare	NY	0	1	0
139	Felician Services Inc.	IL	0	1	0
134	Otterbein SeniorLife	OH	0	0	20
138	Brio Living Services	MI	0	0	14
4	Asbury Communities, Inc.	MD	0	0	6
142	United Methodist Communities	NJ	0	0	4
144	Wesbury UMC	PA	0	0	1
85	Brio Living Services	MI	0	5	0
188	Wesbury United Methodist Community	PA	0	1	0

Organizational Characteristics: Accreditation

At Least One Accredited Community



n = 143

KEY:

	Not Accredited		Accredited
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83 Accredited Communities through CARF

22 Accreditations through JCAHO

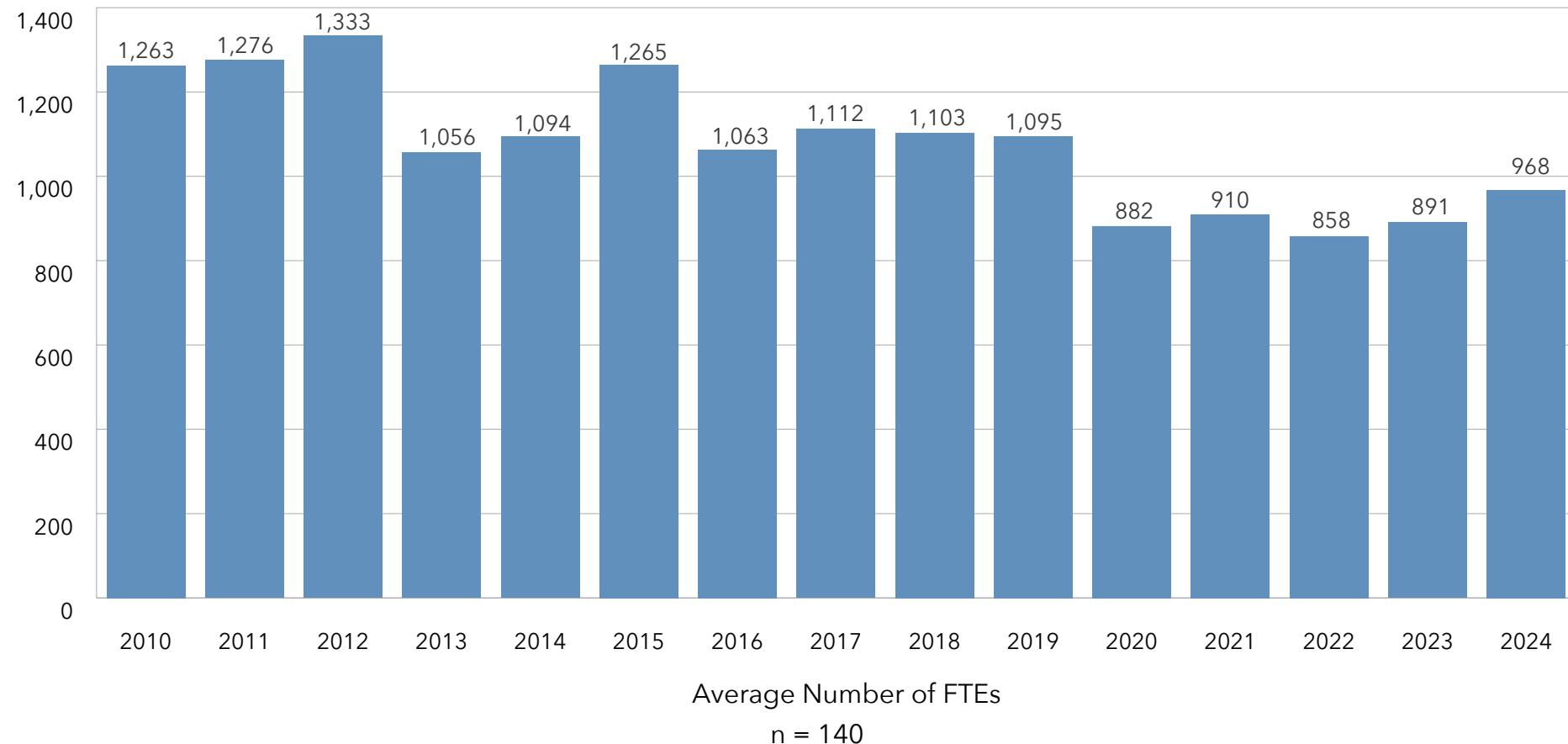
47 Accreditations through EAGLE

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

Organizational Characteristics: Staffing

Average Number of Employees, 2010-2024

2024 Average FTE/Resident: 0.55



2010-2012 reflect changes to the largest 100.

2013-2016 reflect changes to the largest 150.

2017-2023 reflect changes to the largest 200.

Analysis of the Data: Staffing

Summary of Employees, 2010-2024

Staffing

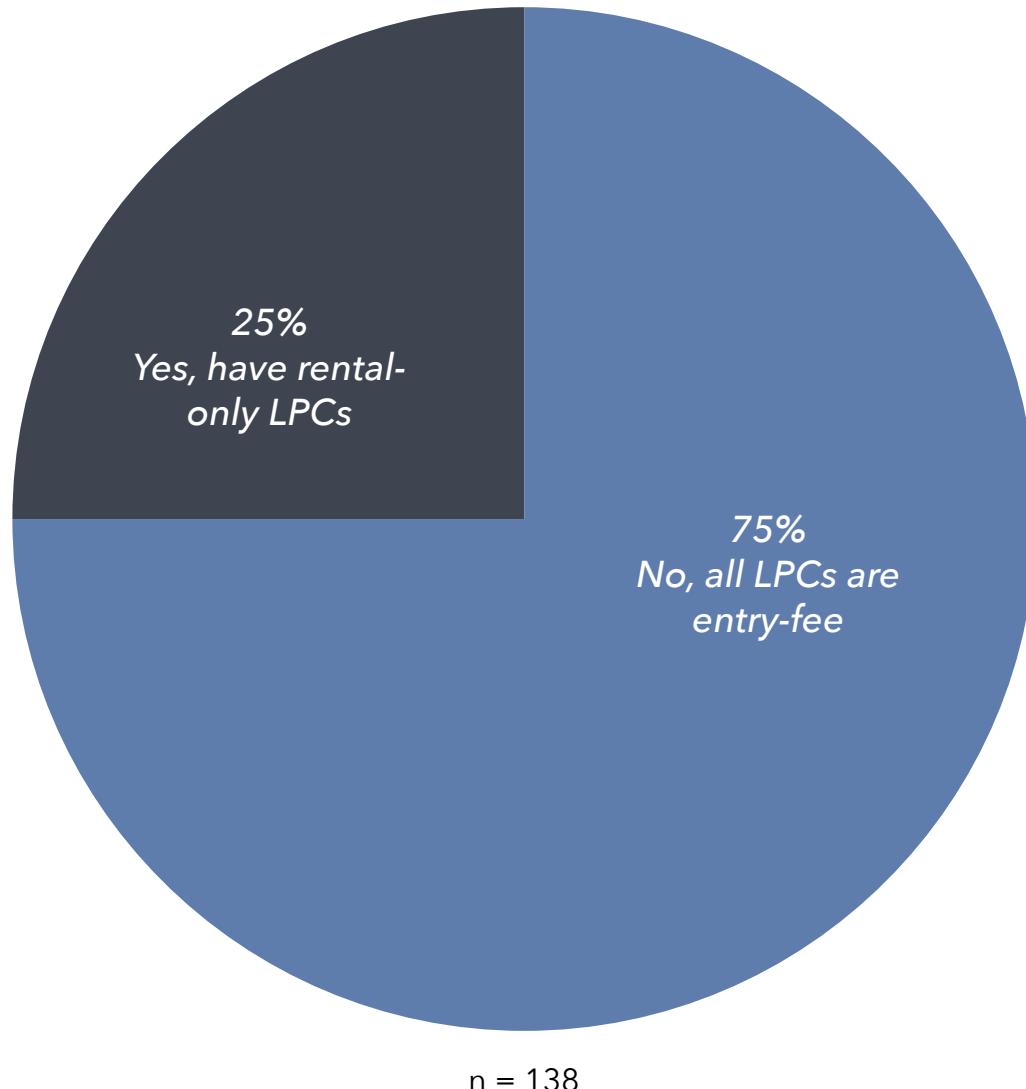
The LZ 200 analyses include an examination of the number of full-time equivalents (FTEs) each organization employs. An average of 968 FTEs were employed per organization throughout 2024. Note that the number of FTEs have decreased since the 2018 publication with the expansion to the largest 200 organizations as the size of the organizations get smaller the further above the 150 ranking.

Analysis for 2025 LZ 200 by Year		
Year	Average Number of FTEs	Average FTE/Resident
2010 avg FTE/resident (n=97)	1,263	0.57
2011 avg FTE/resident (n=96)	1,276	0.56
2012 avg FTE/resident (n=90)	1,333	0.56
2013* avg FTE/resident (n=124)	1,056	0.68
2014* avg FTE/resident (n=123)	1,093	0.58
2015* avg FTE/resident (n=123)	1,265	0.61
2016* avg FTE/resident (n=129)	1,063	0.62
2017** avg FTE/resident (n=162)	1,112	0.67
2018** avg FTE/resident (n=161)	1,103	0.63
2019** avg FTE/resident (n=160)	1,095	0.60
2020** avg FTE/resident (n=144)	882	0.54
2021** avg FTE/resident (n=130)	910	0.53
2022** avg FTE/resident (n=142)	858	0.53
2023** avg FTE/resident (n=141)	891	0.52
2024** avg FTE/resident (n=140)	968	0.55

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

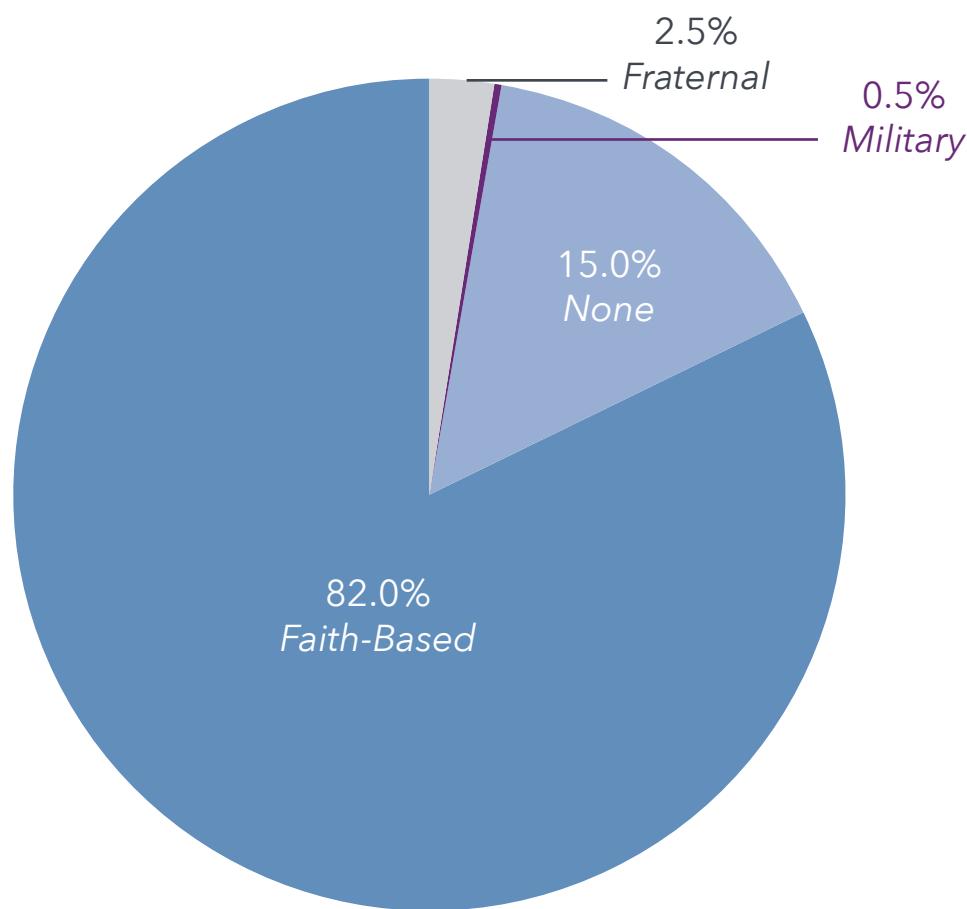
Organizational Characteristics: Rental LPCs

Organizations That Have Fully Rental LPCs



Analysis of the Data: Affiliations

Affiliation by Total Number of Systems

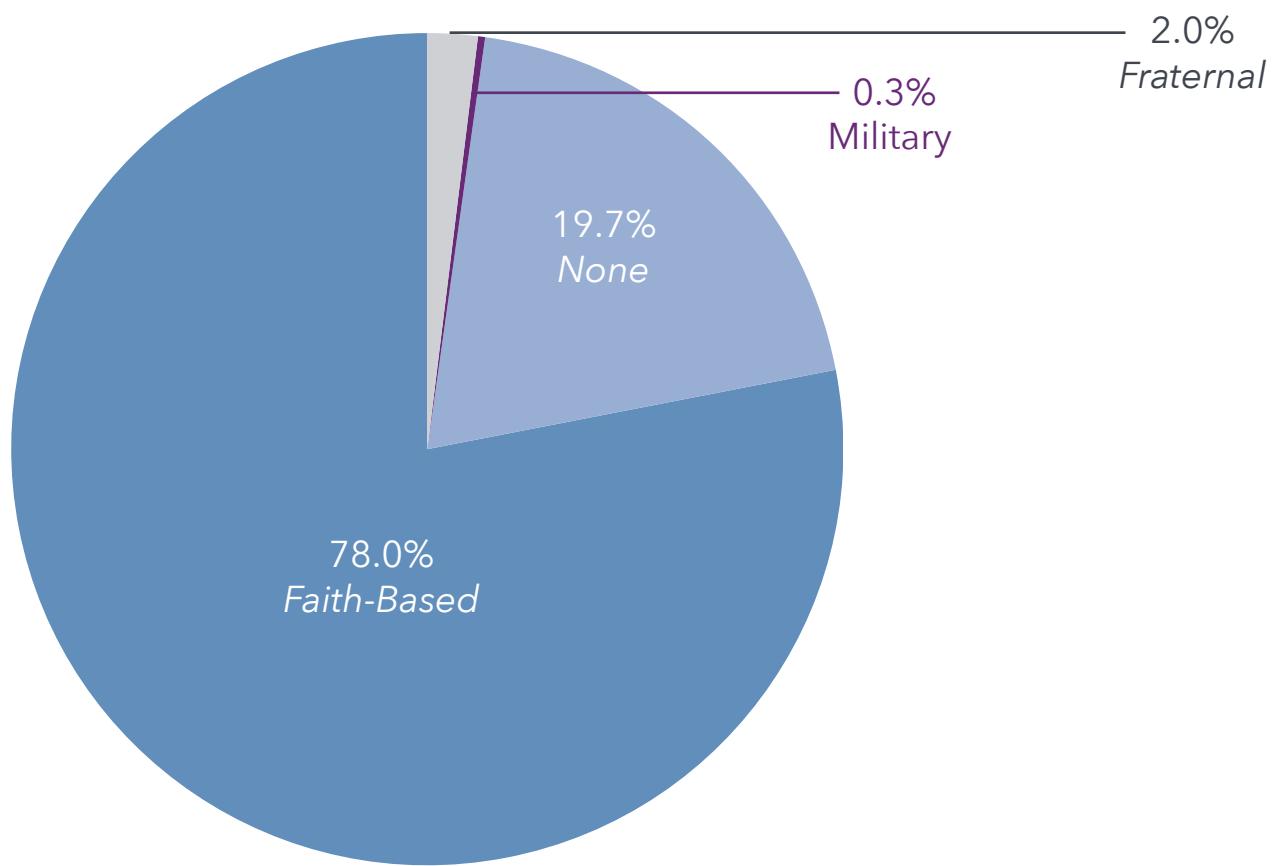


Affiliation

More than 80% of the LZ 200 organizations have an affiliation with a religious organization, predominantly Lutheran, Methodist, Presbyterian, and Catholic, or a fraternal or military group (Chart 4-14a). Lutheran organizations represent the largest number, with more than 50,000 units. Presbyterian affiliation follows with more than 45,000 units.

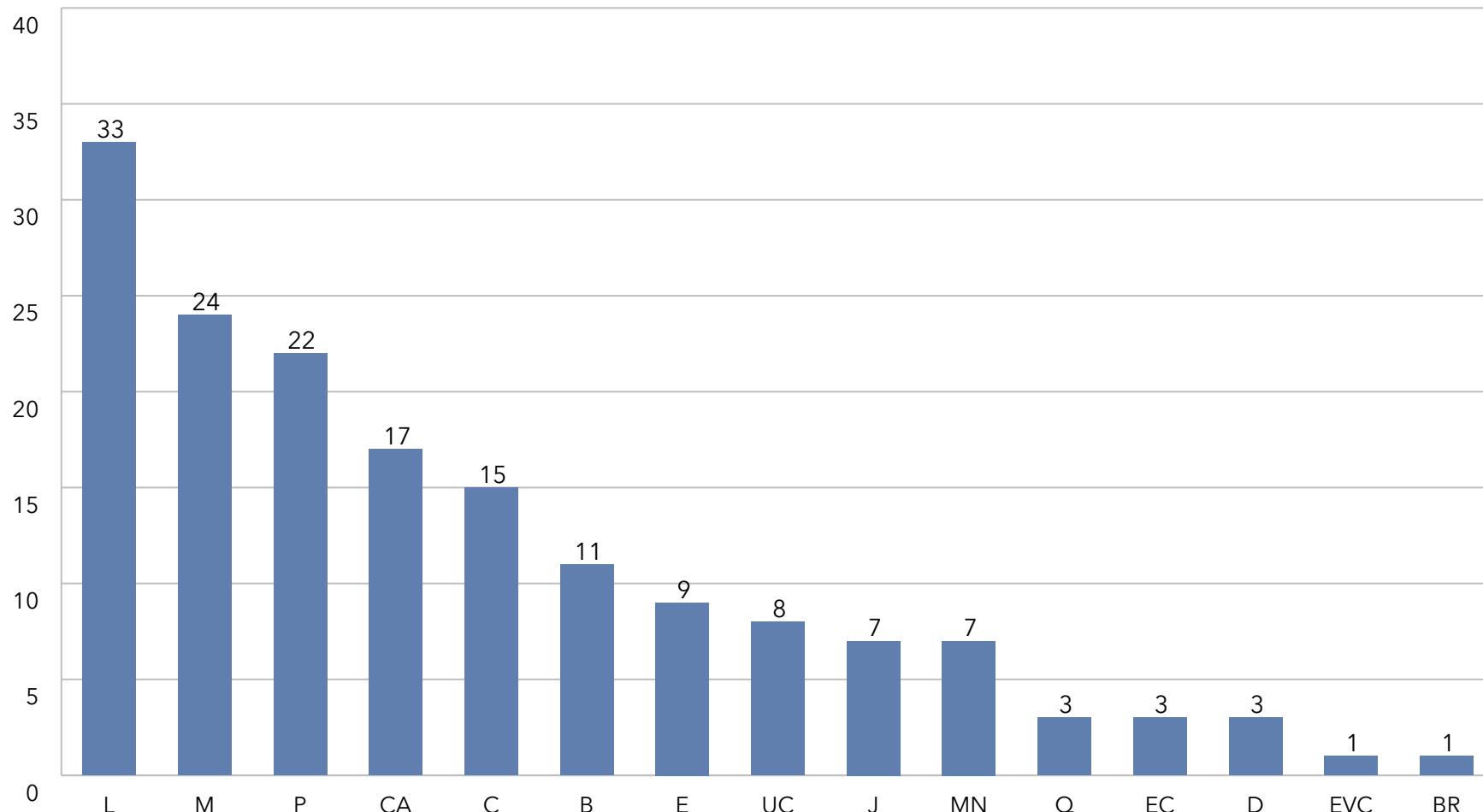
Analysis of the Data: Affiliations

Affiliation by Total Number of Units



Analysis of the Data: Affiliations

Faith-Based Affiliations, by Total Number of Systems

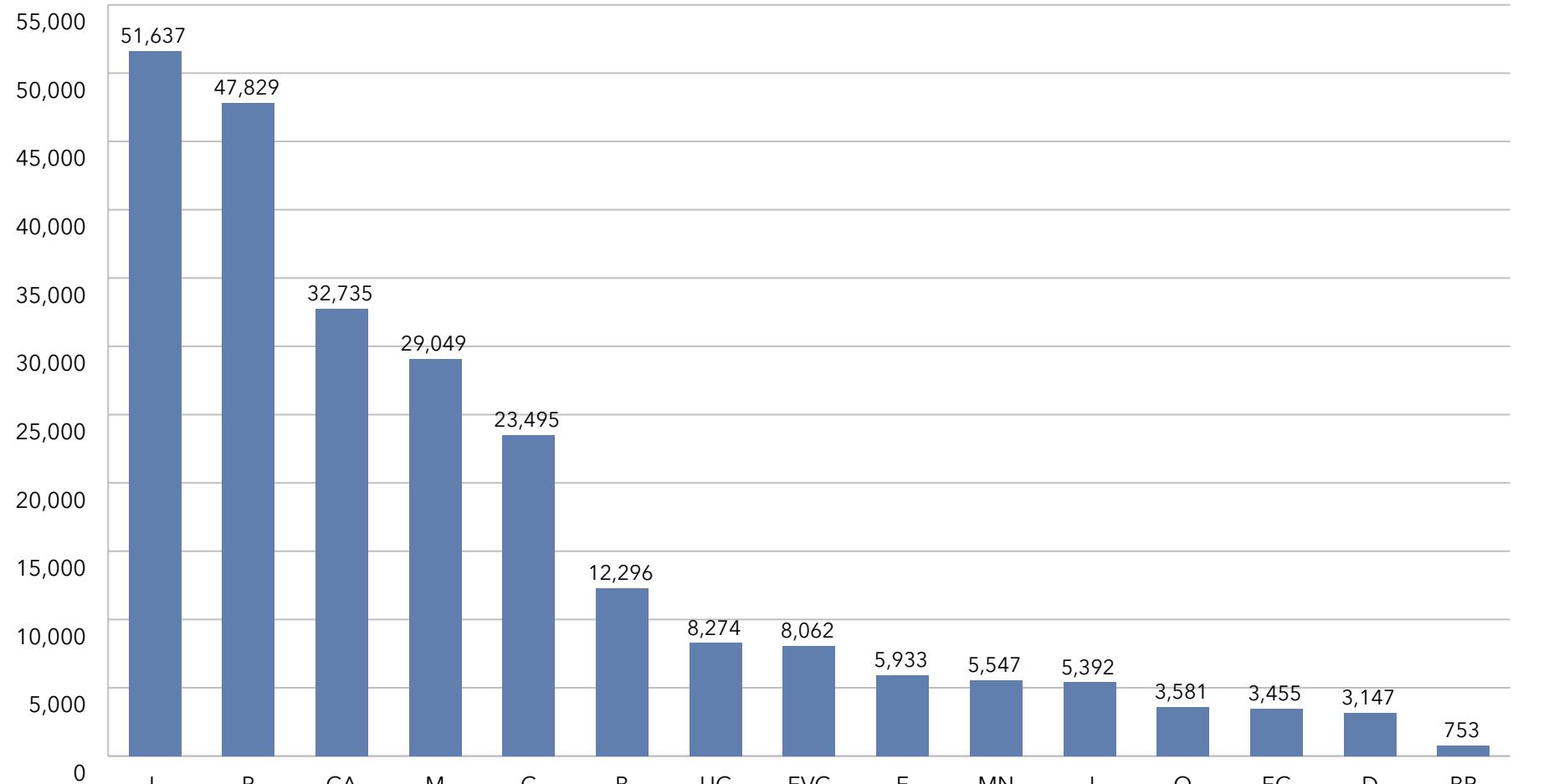


KEY:	B	Baptist	D	Dutch Reformed	J	Jewish	P	Presbyterian
	BR	Brethren	E	Episcopal	L	Lutheran	Q	Quaker
	C	Christian	EC	Ecumenical	M	Methodist	UC	United Church of Christ
	CA	Catholic	EVC	Evangelical Covenant	MN	Mennonite		

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

Analysis of the Data: Affiliations

Faith-Based Affiliations, by Total Units



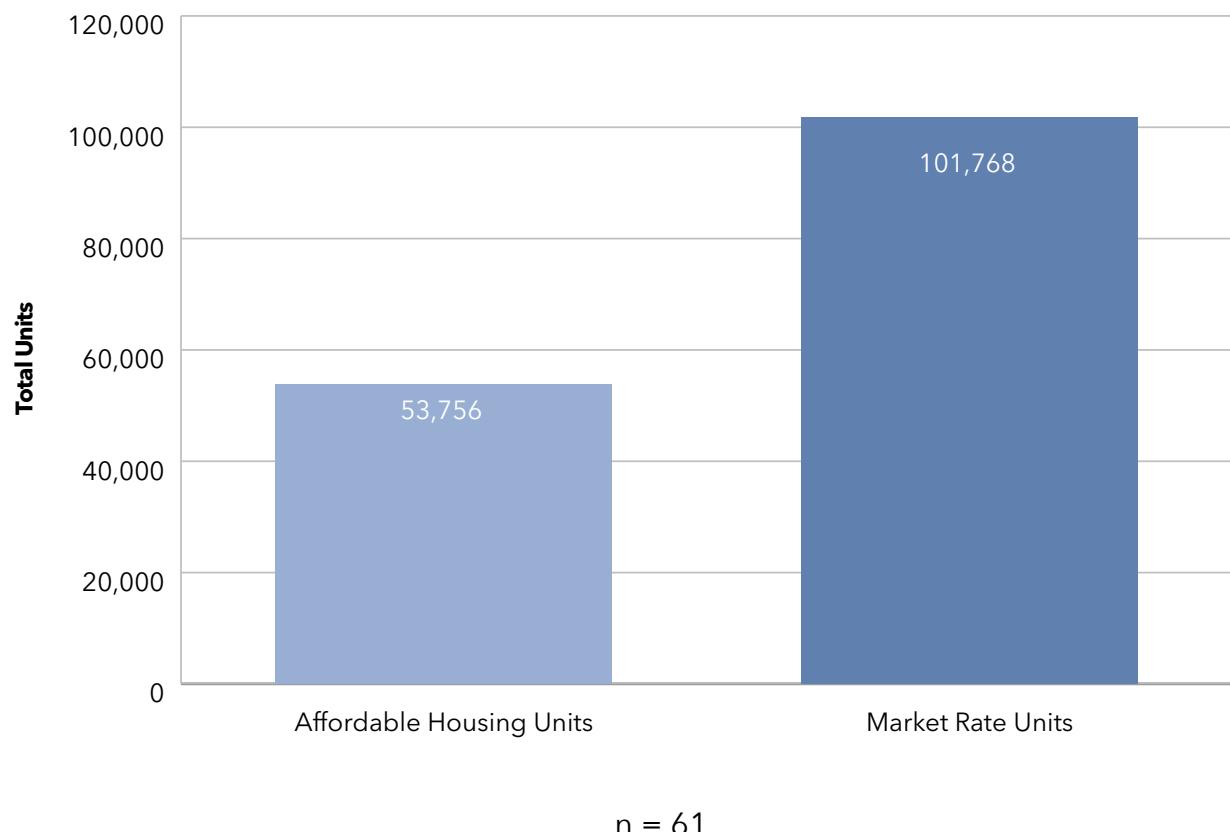
KEY:	B	Baptist	D	Dutch Reformed	J	Jewish	P	Presbyterian
	BR	Brethren	E	Episcopal	L	Lutheran	Q	Quaker
	C	Christian	EC	Ecumenical	M	Methodist	UC	United Church of Christ
	CA	Catholic	EVC	Evangelical Covenant	MN	Mennonite		

Organizational Characteristics: Affordable Housing

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

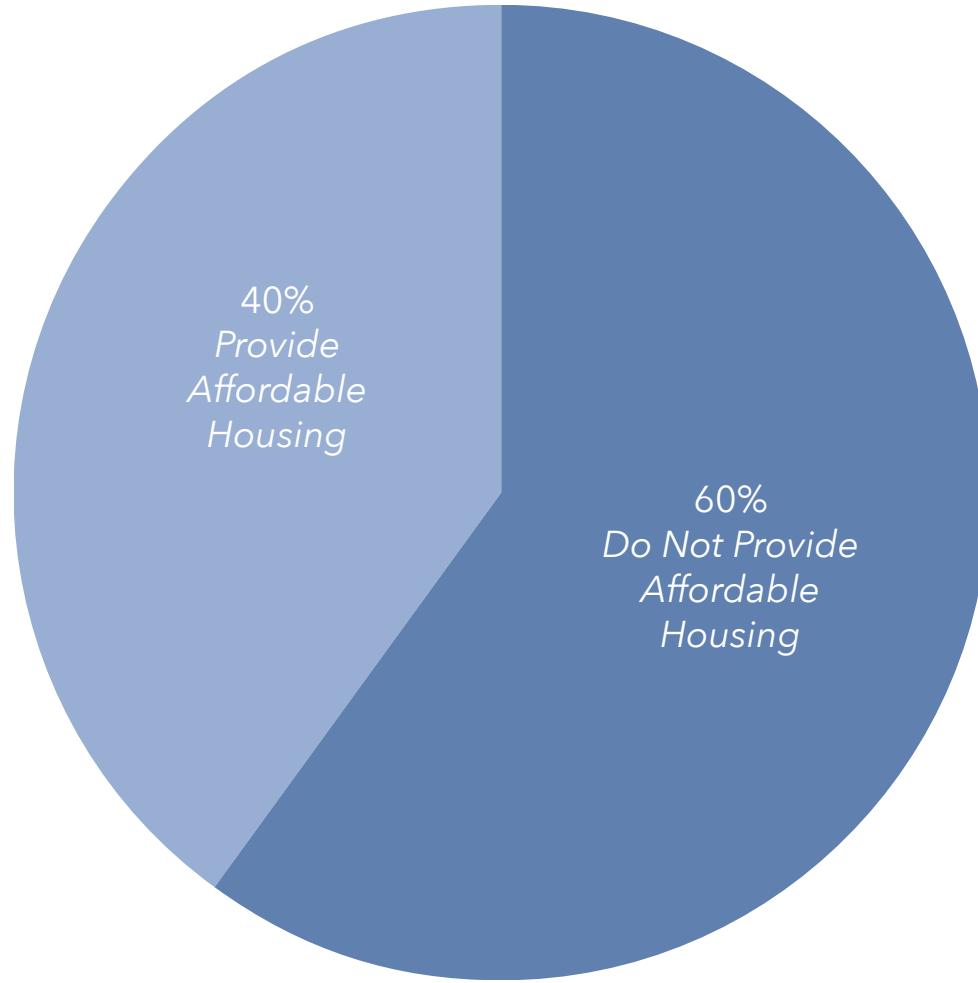
Affordable Housing

The ranking of the LZ 200 organizations by the number of affordable (non-market-rate & market rate) units is included with this research to show that several the LZ 200 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Section 4-15 detail these listings further. The data reveal that among the LZ 200, thirty-one percent (31%) have affordable housing units.



Organizational Characteristics: Affordable Housing

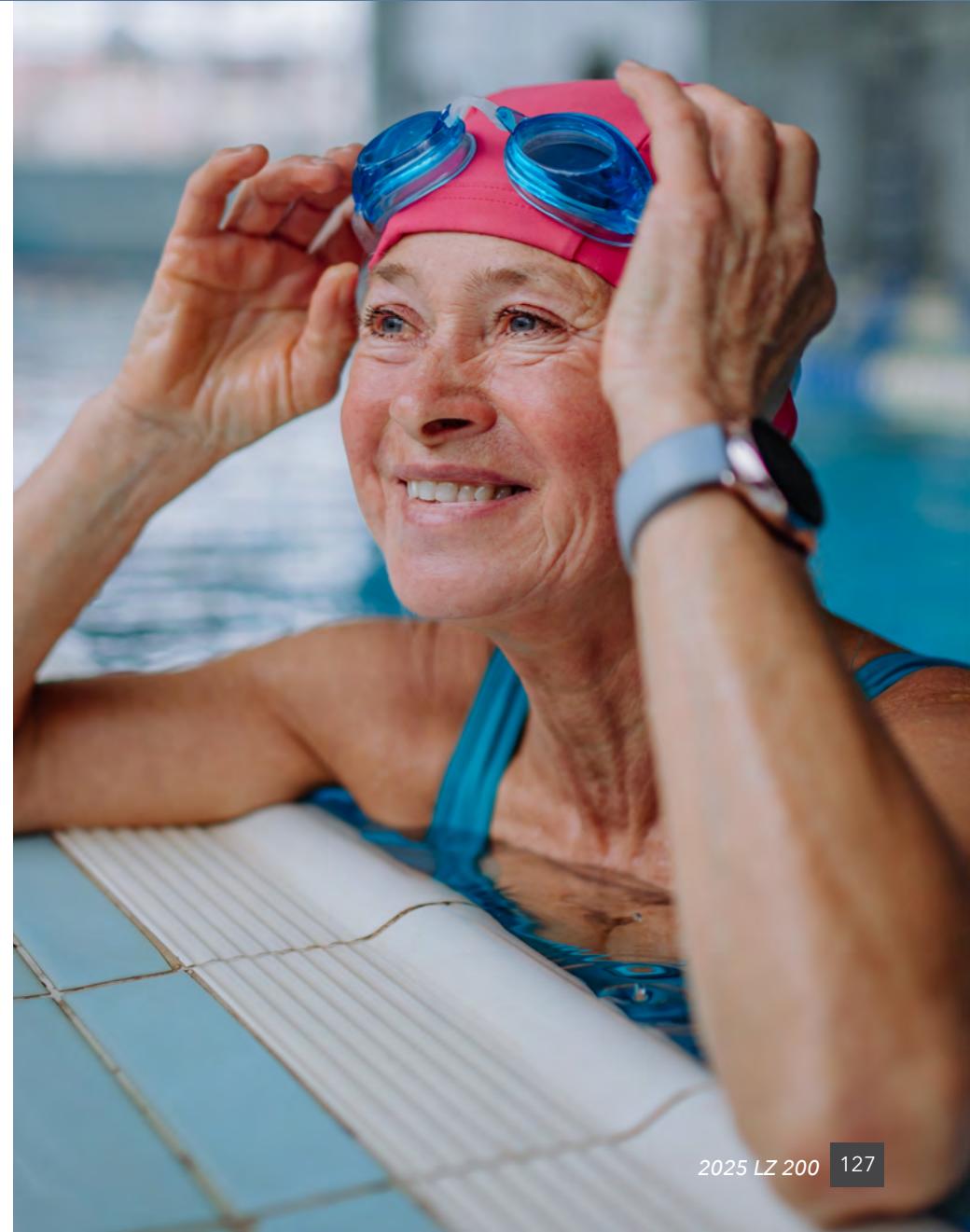
Percentage Providing Affordable Housing



n = 61

Systems by Total Market-Rate and Affordable Units

Chart 4.15c presents an aggregate ranking of unit types, market rate and market rate affordable housing. This type of ranking better reflects the size and scope of each organization that provides residential options for seniors of varying income levels. For example, National Church Residences is ranked as LZ 200 #31 (**Primary Ranking**) with 2,141 total market-rate units while the organization is ranked #2 with 19,381 total affordable housing units. By aggregating these two categories of seniors housing, the organization is the second largest among the LZ 200 with 21,522 total units.



Additional Listings: Multi-Site Senior Living Providers

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

2025 Combined MR & AFF Rank	2025 LZ200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	AFF
1	1	National Senior Communities	DC	23,329	20,487	1,834	1,008	0
2	31	National Church Residences	OH	21,522	1,278	716	147	19381
3	2	The Evangelical Lutheran Good Samaritan Society	SD	12,805	2,973	2,734	7,098	0
4	6	HumanGood	PA	12,131	3,684	1,322	1,086	6039
5	3	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	10,531	7,349	1,519	1,663	0
6	4	Presbyterian Homes & Services	MN	10,527	5,908	2,882	1,448	289
7	19	Transforming Age	WA	8,967	1,971	1,153	138	5705
8	5	Ascension living	MO	6,692	1,800	1,203	3,689	0
9	7	Covenant Living Communities and Services	IL	5,933	4,058	953	922	0
10	13	Westminster Retirement Communities of Florida	FL	5,671	2,448	619	770	1834
11	9	Trinity Health Senior Communities	MI	5,548	1,989	1,112	1,938	509
12	8	Lifespace Communities, Inc.	TX	5,374	3,652	685	1,037	0
13	10	Benedictine	MN	4,766	940	1,737	2,089	0
14	18	Presbyterian Senior Living	PA	4,587	2,025	624	799	1139
15	24	Springpoint Senior Living, Inc.	NJ	4,363	1,709	378	491	1785
16	11	Front Porch Communities and Services	CA	4,346	3,521	171	654	0
17	14	EverTrue fka Lutheran Senior Services	MO	4,321	2,422	1,008	376	515
18	12	Pacific Retirement Services	OR	4,224	2,987	763	474	0
19	47	United Church Homes, Inc.	OH	3,923	857	215	545	2306
20	15	Cassia	MN	3,745	88	2,233	1,386	38
21	17	Otterbein SeniorLife	OH	3,684	1,627	643	1,338	76
22	16	Concordia Lutheran Ministries	PA	3,642	1,137	1,761	744	0
23	54	Presbyterian Villages of Michigan	MI	3,420	1,100	264	102	1954
24	22	Ecumen	MN	3,341	513	1,709	379	740
25	21	Asbury Communities, Inc.	MD	3,270	2,037	528	442	263

MR: Market-rate | AFF: Affordable Housing

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

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

2025 Combined MR & AFF Rank	2025 LZ200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	AFF
26	20	BHI Senior Living, Inc.	IN	3,236	1,431	1,121	684	0
27	23	The Carmelite System	NY	2,652	231	355	2,003	63
28	26	Ohio Living Communities	OH	2,635	1,601	435	474	125
29	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,532	1,615	233	684	0
30	62	Presbyterian SeniorCare Network	PA	2,438	487	378	506	1,067
31	27	The Kendal Corporation	DE	2,421	1,817	329	275	0
32	32	Christian Care Companies	AZ	2,348	1,685	412	20	231
33	53	Hebrew SeniorLife	MA	2,338	654	115	715	854
34	28	Bethesda Senior Living Communities	CO	2,313	677	1,636	0	0
35	29	Presbyterian Manors of Mid-America, Inc.	KS	2,176	925	538	713	0
36	37	Kintura fka Brightspire and Well-Spring Group	NC	2,164	1,340	252	275	297
37	30	Volunteers of America	VA	2,146	604	820	722	0
38	43	Covenant Health	MA	2,124	0	364	1,332	428
39	33	Willow Valley Communities	PA	2,102	1,651	220	231	0
40	34	Homewood Retirement Centers, Inc.	MD	1,941	1,180	310	451	0
41	35	Buckner Retirement Services	TX	1,904	1,202	406	296	0
42	36	Greencroft Communities	IN	1,875	696	578	601	0
43	48	Methodist Retirement Communities	TX	1,868	798	457	294	319
44	39	Lutheran Services Carolinas	NC	1,862	591	334	904	33
45	40	Eventide and Tabitha	MN	1,855	245	681	883	46
46	38	Masonicare	CT	1,837	797	660	380	0
47	41	ArchCare	NY	1,782	0	59	1,723	0
48	74	Presbyterian Homes of Georgia, Inc.	GA	1,749	755	149	335	510
49	42	Baptist Village Communities	OK	1,722	1,116	288	318	0
50	44	Loretto	NY	1,684	210	551	923	0

MR: Market-rate | AFF: Affordable Housing

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

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

2025 Combined MR & AFF Rank	2025 LZ200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	AFF
51	45	Franciscan Communities, Inc.	IL	1,665	740	387	538	0
52	68	Phoebe Ministries	PA	1,659	496	262	545	356
53	46	Life Enriching Communities	OH	1,641	921	392	328	0
54	59	Sequoia Living, Inc.	CA	1,612	799	126	88	599
55	51	St. Francis Health Services of Morris, Inc.	MN	1,604	78	613	808	105
56	133	Christian Care Communities	KY	1,553	262	154	297	840
57	49	Immanuel	NE	1,546	982	402	162	0
58	50	Vivie fka KNWM (Knuke Nelson / Walker Methodist)	MN	1,540	647	773	120	0
59	52	Bethesda Health Group, Inc.	MO	1,491	761	78	652	0
60	55	Mississippi Methodist Senior Services, Inc.	MS	1,460	786	354	320	0
61	88	Illuminus, Inc.	WI	1,436	252	448	481	255
62	56	FellowshipLIFE, Inc.	NJ	1,409	893	323	193	0
63	57	LifeSpire of Virginia	VA	1,401	894	298	209	0
64	58	Presbyterian Living fka Presbyterian Homes, Inc.	IL	1,396	818	237	341	0
65	70	Friendship	VA	1,384	484	313	481	106
66	60	Sun Health	AZ	1,381	1,000	194	187	0
67	110	Brio Living Services	MI	1,343	664	265	144	270
68	64	EveryAge	NC	1,335	708	180	447	0
69	75	Givens Communities	NC	1,312	792	43	115	362
70	66	Magnolia Manor, Inc.	GA	1,307	294	170	843	0
71	72	Heritage Ministries	NY	1,268	363	221	684	0
72	114	Lutheran SeniorLife	PA	1,259	524	215	303	217
73	76	Wesley Enhanced Living	PA	1,231	635	236	360	0
74	78	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	0
75	89	Christian Health Care Center	NJ	1,227	514	95	304	314

MR: Market-rate | AFF: Affordable Housing

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

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

2025 Combined MR & AFF Rank	2025 LZ200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	AFF
76	80	Holland Home	MI	1,227	765	303	159	0
77	157	Cardinal Ritter Senior Services	MO	1,207	205	122	230	650
78	82	American Baptist Homes of the Midwest	MN	1,204	374	252	578	0
79	61	Felician Services Inc.	IL	1,187	313	288	405	181
80	84	SpiriTrust Lutheran	PA	1,187	557	286	344	0
81	86	Lutheran Homes of South Carolina Inc.	SC	1,186	453	358	375	0
82	101	United Methodist Communities	NJ	1,172	88	537	247	300
83	90	Wesley	WA	1,154	795	251	108	0
84	92	Friendship Villages of St. Louis	MO	1,153	783	136	234	0
85	69	Providence Life Services	IL	1,147	614	255	117	161
86	94	Mather	IL	1,141	1,005	59	77	0
87	96	Legacy Lifecare	MA	1,141	0	361	780	0
88	98	Community Wellness Partners	NY	1,138	124	298	716	0
89	100	Garden Spot Communities	PA	1,135	786	193	151	5
90	102	Eskaton	CA	1,130	492	543	95	0
91	104	Ingleside	MD	1,124	834	157	133	0
92	106	Baruch Senior Ministries	MI	1,114	6	1,108	0	0
93	108	United Methodist Homes	NY	1,080	435	219	426	0
94	112	Pinnacle Living	VA	1,061	544	374	143	0
95	118	The United Methodist Retirement Homes, Inc.	NC	1,048	690	140	194	24
96	116	Saint Therese	MN	1,041	526	287	228	0
97	63	Goodwin Living	VA	1,003	596	234	173	0
98	65	Tandem Living fka Mennonite Home Communities	PA	997	752	85	160	0
99	67	Presbyterian Communities of South Carolina	SC	987	422	307	258	0
100	71	The RiverWoods Group	NH	985	699	187	99	0

MR: Market-rate | AFF: Affordable Housing

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

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

2025 Combined MR & AFF Rank	2025 LZ200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	AFF
101	73	Liberty Lutheran Services	PA	978	443	318	217	0
102	81	Christian Living Communities	CO	974	433	309	192	40
103	77	Lutheran Life Communities	IL	949	233	213	503	0
104	79	Vista Prairie Communities	MN	939	100	839	0	0
105	109	Living Branches	PA	934	459	232	143	100
106	83	National Lutheran Communities and Services	MD	932	546	206	180	0
107	99	Landis Communities	PA	922	614	159	103	46
108	85	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	0
109	200	HutsonWood	TN	919	0	72	299	548
110	87	St. John's Healthcare Corp	NY	916	403	38	475	0
111	91	Blue Skies of Texas	TX	908	699	129	80	0
112	93	Moorings Park	FL	898	683	109	106	0
113	95	Alliance Health & Human Services	MA	893	0	77	816	0
114	97	Menno Haven, Inc.	PA	880	497	223	160	0
115	103	Wesley Willows	IL	859	566	202	91	0
116	113	Ascentria Care Alliance	MA	853	45	90	673	45
117	129	Simpson Senior Services	PA	849	496	149	82	122
118	105	The New Jewish Home	NY	838	24	0	814	0
119	107	Forefront Living	TX	837	548	201	88	0
120	111	Lutheran Social Ministries of Maryland	MD	827	622	90	115	0
121	191	Jewish Senior Life of Metropolitain of Detroit	MI	819	294	121	0	404
122	115	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	0
123	117	Heritage Pointe Communities	IN	785	187	255	343	0
124	119	Westminster-Canterbury on Chesapeake Bay	VA	783	595	80	108	0
125	132	Masonic Homes of Kentucky, Inc	KY	775	449	129	136	61

MR: Market-rate | AFF: Affordable Housing

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

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

2025 Combined MR & AFF Rank	2025 LZ200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	AFF
126	137	Ebenezer Society	MN	770	0	443	253	74
127	120	St. Ann's Community	NY	769	246	75	448	0
128	121	Grace Inspired Ministries	PA	767	451	151	165	0
129	122	United Church of Christ Homes	PA	766	267	124	375	0
130	123	Sunnyside Communities	VA	756	478	151	127	0
131	124	Unitas Communities fka Morningstar Living / Moravian Manor Communities	PA	753	470	137	146	0
132	125	Messiah Lifeways	PA	753	455	163	135	0
133	126	Episcopal Seniorlife Communities	NY	752	407	193	152	0
134	127	Ohio Masonic Communities	OH	734	351	249	134	0
135	128	Futura Age	WA	733	221	114	398	0
136	130	Bethany Lutheran Homes Inc	WI	726	282	321	123	0
137	131	Emerald Communities	WA	725	527	107	91	0
138	134	Benevolent Corporation Cedar Community	WI	706	412	219	75	0
139	145	Rockwood Retirement Communities	WA	700	445	148	45	62
140	154	Episcopal Communities & Services for Seniors	CA	697	443	120	0	134
141	136	Sunset Manor, Inc.	MI	697	385	312	0	0
142	135	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	0
143	196	Canterbury Woods	NY	690	296	48	50	296
144	138	Baptist Homes & Healthcare Ministries	MO	680	168	119	393	0
145	139	LutherCare	PA	678	482	110	86	0
146	140	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	0
147	141	Vincentian Collaborative Services	PA	675	66	82	527	0
148	142	Lutheran Life Villages	IN	672	183	164	325	0
149	143	Community First Solutions	OH	657	220	309	128	0
150	162	Bluestem Communities	KS	654	325	61	163	105

MR: Market-rate | AFF: Affordable Housing

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

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

2025 Combined MR & AFF Rank	2025 LZ200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	AFF
151	144	Friends Homes, Inc.	NC	646	445	92	109	0
152	146	Smith Senior Living	IL	636	322	144	170	0
153	147	Wellspring Lutheran Services	MI	635	125	169	341	0
154	148	Eliza Jennings Senior Care Network	OH	628	176	207	245	0
155	149	Morningside Ministries	TX	625	395	90	140	0
156	170	St. John's United	MT	619	203	201	101	114
157	150	ThriveMore	NC	594	357	136	101	0
158	152	Brethren Retirement Community	OH	587	228	199	160	0
159	151	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	0
160	188	Skaalen Retirement Services	WI	585	229	101	91	164
161	153	Havenwood Heritage Heights	NH	567	367	63	137	0
162	155	Bethel	NY	563	170	130	263	0
163	156	The Legacy Senior Communities	TX	557	298	145	114	0
164	193	Beechwood Continuing Care, Inc.	NY	556	186	0	220	150
165	158	Friendly Senior Living	NY	555	298	57	200	0
166	159	Sholom Community Alliance	MN	552	153	142	257	0
167	160	Silverstone Living	NH	550	286	139	125	0
168	161	Ararat Home of Los Angeles	CA	550	73	153	324	0
169	163	Church Homes, Inc.	CT	542	319	24	199	0
170	164	Redstone Presbyterian SeniorCare	PA	535	307	151	77	0
171	165	Episcopal Retirement Services	OH	522	309	75	138	0
172	166	Christian Village Communities	OH	521	189	182	150	0
173	167	Willow Brook Christian Communities	OH	518	267	167	84	0
174	168	CRISTA Senior Living	WA	517	374	143	0	0
175	169	Medford Leas	NJ	514	395	105	14	0

MR: Market-rate | AFF: Affordable Housing

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

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

2025 Combined MR & AFF Rank	2025 LZ200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	AFF
176	171	Judson Services, Inc.	OH	500	227	135	138	0
177	172	The Village of St. Edward	OH	492	126	285	81	0
178	173	Convivial Life, Inc.	FL	488	307	181	0	0
179	174	St. Paul's Senior Services	CA	484	243	182	59	0
180	175	Bethany St. Joseph Corporation	WI	473	135	158	180	0
181	176	Deaconess Abundant Life Communities	MA	469	283	144	42	0
182	177	The Loomis Communities, Inc.	MA	468	368	58	42	0
183	179	Resthaven	MI	466	183	138	145	0
184	178	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	0
185	180	Taylor Community	NH	457	310	147	0	0
186	182	Guardian Angels Senior Services	MN	451	36	295	120	0
187	181	Baptist Senior Family	PA	451	326	62	63	0
188	183	Michigan Masonic Homes	MI	442	38	155	249	0
189	184	Bethesda	MN	430	89	93	248	0
190	185	Allegheny Lutheran Social Ministries	PA	428	173	103	152	0
191	187	Lutheran Home & Harwood Place	WI	427	169	98	160	0
192	186	Good Shepherd Communities	NY	427	194	67	166	0
193	189	Wesbury UMC	PA	418	117	91	210	0
194	190	A.G. Rhodes	GA	416	0	0	416	0
195	192	Parker Health Group	NJ	407	0	60	347	0
196	194	CJE SeniorLife	IL	405	240	165	0	0
197	195	Oaknoll	IA	397	301	38	58	0
198	197	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	0
199	198	Trinity Senior Services fka Milwaukee Catholic Home	WI	386	205	74	107	0
200	199	Pleasant View Communities	PA	380	229	59	92	0

MR: Market-rate | AFF: Affordable Housing



Organizational Characteristics: Managed Units & Communities

Providers that Manage, Ranked by Managed-Only Units

2025 LZ 200 Managed Rank	2025 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
1	31	National Church Residences	OH	5,613	73
2	137	Ebenezer Society	MN	5,177	48
3	6	HumanGood	CA	1,879	28
4	38	Masonicare	CT	1,873	15
5	60	Presbyterian SeniorCare Network	PA	1,759	18
6	47	United Church Homes, Inc.	OH	1,585	21
7	80	Eskaton	CA	1,539	27
8	9	Trinity Health Senior Communities	MI	1,040	19
9	19	Transforming Age	WA	791	10
10	50	Vivie fka KNWM (Knuite Nelson / Walker Methodist)	MN	779	17
11	37	Kintura fka Brightspire and Well-Spring Group	NC	646	2
12	73	Illuminus, Inc.	WI	497	9
13	56	FellowshipLIFE, Inc.	NJ	497	1
14	42	Baptist Village Communities	OK	468	3
15	100	Christian Living Communities	CO	390	2
16	21	Asbury Communities, Inc.	MD	351	3
17	4	Presbyterian Homes & Services	MN	325	2
18	59	Sun Health	AZ	303	1
19	15	Cassia	MN	297	2
20	143	Community First Solutions	OH	266	1
21	52	Bethesda Health Group, Inc.	MO	266	3
22	175	Bethany St. Joseph Corporation	WI	238	5
23	107	Alliance Health & Human Services	MA	222	2
24	14	EverTrue fka Lutheran Senior Services & Diakon	MO	217	3
25	54	Presbyterian Villages of Michigan	MI	209	6

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

Organizational Characteristics: Managed Units & Communities (Continued)

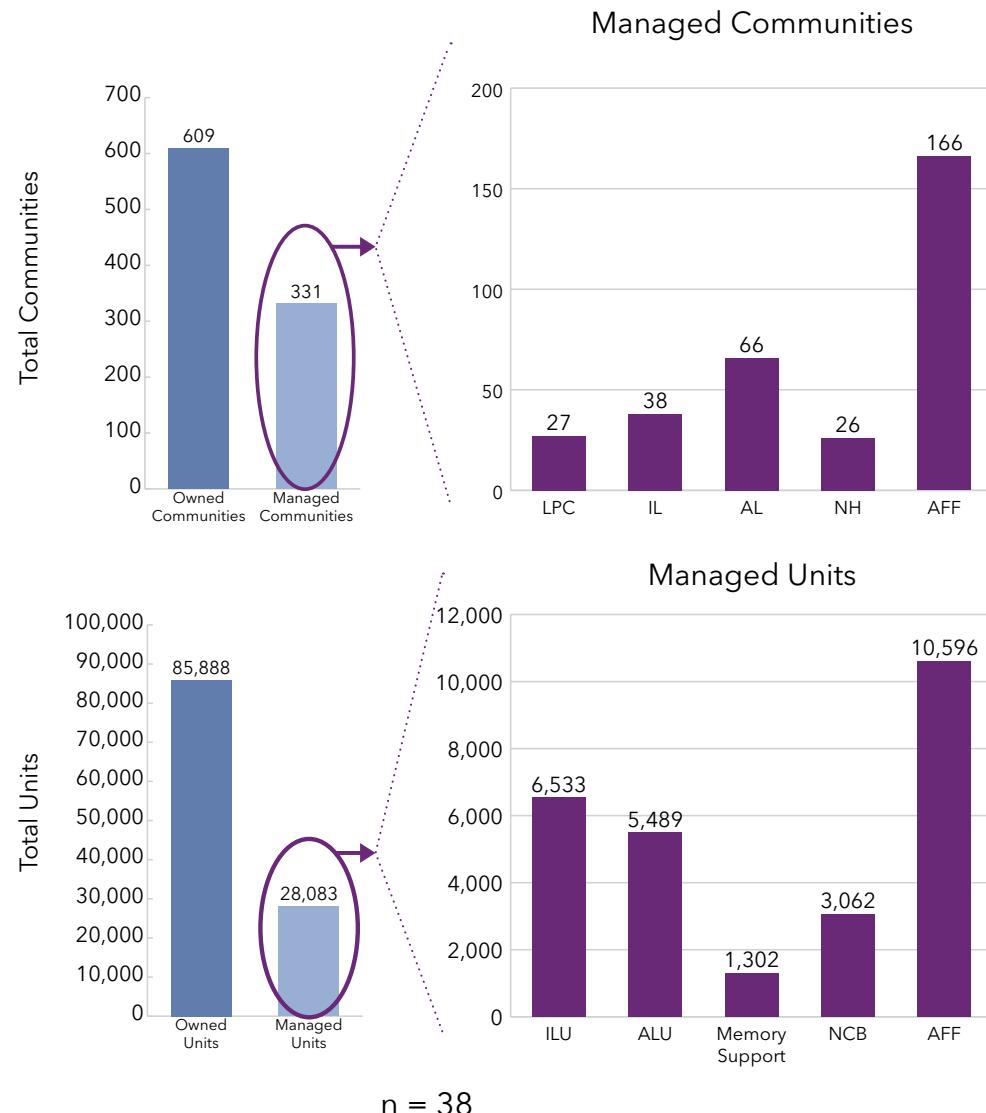
Providers that Manage, Ranked by Managed-Only Units

2025 LZ 200 Managed Rank	2025 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
26	91	Goodwin Living	VA	161	1
27	86	Lutheran SeniorLife	PA	158	2
28	152	Brethren Retirement Community	OH	128	1
29	170	St. John's United	MT	100	1
30	20	BHI Senior Living, Inc.	IN	99	1
31	84	Brio Living Services	MI	80	1
32	198	Trinity Senior Services fka Milwaukee Catholic Home	WI	72	2
33	24	Springpoint Senior Living, Inc.	NJ	40	1
34	51	St. Francis Health Services of Morris, Inc.	MN	18	1

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

Organizational Characteristics: Managed Units & Communities

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

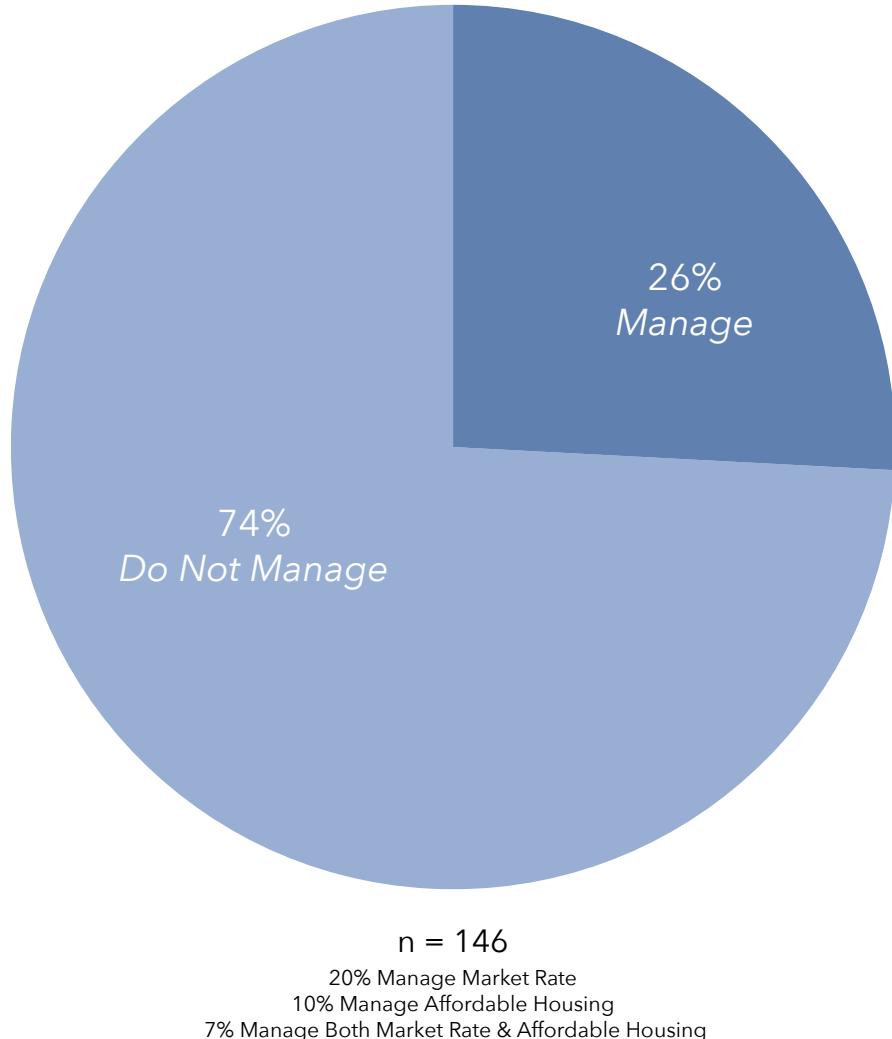


Organizational Characteristics: Managed Units & Communities

Percentage that Manage

Managed Units and Communities

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



Organizational Characteristics: Managed Units & Communities

Providers that Manage, Ranked by Market Rate & Managed Units

2025 Combined MR & MGD Rank	2025 LZ 200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	MGD
1	1	National Senior Communities	DC	23,329	20,487	1,834	1,008	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	12,805	2,973	2,734	7,098	0
3	4	Presbyterian Homes & Services	MN	10,563	5,908	2,882	1,448	325
4	3	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	10,531	7,349	1,519	1,663	0
5	6	HumanGood	CA	7,971	3,684	1,322	1,086	1,879
6	31	National Church Residences	OH	7,754	1,278	716	147	5,613
7	5	Ascension living	MO	6,692	1,800	1,203	3,689	0
8	9	Trinity Health Senior Communities	MI	6,079	1,989	1,112	1,938	1,040
9	7	Covenant Living Communities and Services	IL	5,933	4,058	953	922	0
10	137	Ebenezer Society	MN	5,873	0	443	253	5,177
11	8	Lifespace Communities, Inc.	TX	5,374	3,652	685	1,037	0
12	10	Benedictine	MN	4,766	940	1,737	2,089	0
13	11	Front Porch Communities and Services	CA	4,346	3,521	171	654	0
14	12	Pacific Retirement Services	OR	4,224	2,987	763	474	0
15	19	Transforming Age	WA	4,053	1,971	1,153	138	791
16	14	EverTrue fka Lutheran Senior Services & Diakon	MO	4,023	2,422	1,008	376	217
17	15	Cassia	MN	4,004	88	2,233	1,386	297
18	13	Westminster Retirement Communities of Florida	FL	3,837	2,448	619	770	0
19	38	Masonicare	CT	3,710	797	660	380	1,873
20	16	Concordia Lutheran Ministries	PA	3,642	1,137	1,761	744	0
21	17	Otterbein SeniorLife	OH	3,608	1,627	643	1,338	0
22	18	Presbyterian Senior Living	PA	3,448	2,025	624	799	0
23	21	Asbury Communities, Inc.	MD	3,358	2,037	528	442	351
24	20	BHI Senior Living, Inc.	IN	3,335	1,431	1,121	684	99
25	47	United Church Homes, Inc.	OH	3,202	857	215	545	1,585

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

Organizational Characteristics: Managed Units & Communities (Continued)

Providers that Manage, Ranked by Market Rate & Managed Units

2025 Combined MR & MGD Rank	2025 LZ 200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	MGD
26	60	Presbyterian SeniorCare Network	PA	3,130	487	378	506	1,759
27	24	Springpoint Senior Living, Inc.	NJ	2,677	1,709	378	491	99
28	80	Eskaton	CA	2,669	492	543	95	1,539
29	22	Ecumen	MN	2,601	513	1,709	379	0
30	23	The Carmelite System	NY	2,589	231	355	2,003	0
31	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,532	1,615	233	684	0
32	37	Kintura fka Brightspire and Well-Spring Group	NC	2,513	1,340	252	275	646
33	26	Ohio Living Communities	OH	2,510	1,601	435	474	0
34	27	The Kendal Corporation	DE	2,421	1,817	329	275	0
35	50	Vivie fka KNWM (Knuke Nelson / Walker Methodist)	MN	2,319	647	773	120	779
36	28	Bethesda Senior Living Communities	CO	2,313	677	1,636	0	0
37	42	Baptist Village Communities	OK	2,190	1,116	288	318	468
38	29	Presbyterian Manors of Mid-America, Inc.	KS	2,176	925	538	713	0
39	30	Volunteers of America	VA	2,146	604	820	722	0
40	32	Christian Care Companies	AZ	2,117	1,685	412	20	0
41	33	Willow Valley Communities	PA	2,102	1,651	220	231	0
42	34	Homewood Retirement Centers, Inc.	MD	1,941	1,180	310	451	0
43	56	FellowshipLIFE, Inc.	NJ	1,906	893	323	193	497
44	35	Buckner Retirement Services	TX	1,904	1,202	406	296	0
45	36	Greencroft Communities	IN	1,875	696	578	601	0
46	39	Lutheran Services Carolinas	NC	1,829	591	334	904	0
47	40	Eventide and Tabitha	MN	1,809	245	681	883	0
48	41	ArchCare	NY	1,782	0	59	1,723	0
49	52	Bethesda Health Group, Inc.	MO	1,757	761	78	652	266
50	43	Covenant Health	MA	1,696	0	364	1,332	0

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

Organizational Characteristics: Managed Units & Communities (Continued)

Providers that Manage, Ranked by Market Rate & Managed Units

2025 Combined MR & MGD Rank	2025 LZ 200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	MGD
51	59	Sun Health	AZ	1,684	1,000	194	187	303
52	44	Loretto	NY	1,684	210	551	923	0
53	73	Illuminus, Inc.	WI	1,678	252	448	481	497
54	54	Presbyterian Villages of Michigan	MI	1,675	1,100	264	102	209
55	45	Franciscan Communities, Inc.	IL	1,665	740	387	538	0
56	46	Life Enriching Communities	OH	1,641	921	392	328	0
57	48	Methodist Retirement Communities	TX	1,549	798	457	294	0
58	49	Immanuel	NE	1,546	982	402	162	0
59	51	St. Francis Health Services of Morris, Inc.	MN	1,499	78	613	808	0
60	53	Hebrew SeniorLife	MA	1,484	654	115	715	0
61	55	Mississippi Methodist Senior Services, Inc.	MS	1,460	786	354	320	0
62	57	LifeSpire of Virginia	VA	1,401	894	298	209	0
63	58	Presbyterian Living fka Presbyterian Homes, Inc.	IL	1,396	818	237	341	0
64	61	EveryAge	NC	1,335	708	180	447	0
65	100	Christian Living Communities	CO	1,324	433	309	192	390
66	62	Magnolia Manor, Inc.	GA	1,307	294	170	843	0
67	63	Phoebe Ministries	PA	1,303	496	262	545	0
68	64	Friendship	VA	1,278	484	313	481	0
69	65	Heritage Ministries	NY	1,268	363	221	684	0
70	66	Presbyterian Homes of Georgia, Inc.	GA	1,239	755	149	335	0
71	67	Wesley Enhanced Living	PA	1,231	635	236	360	0
72	68	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	0
73	69	Holland Home	MI	1,227	765	303	159	0
74	70	American Baptist Homes of the Midwest	MN	1,204	374	252	578	0
75	86	Lutheran SeniorLife	PA	1,200	524	215	303	158

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

Organizational Characteristics: Managed Units & Communities (Continued)

Providers that Manage, Ranked by Market Rate & Managed Units

2025 Combined MR & MGD Rank	2025 LZ 200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	MGD
76	71	SpiriTrust Lutheran	PA	1,187	557	286	344	0
77	72	Lutheran Homes of South Carolina Inc.	SC	1,186	453	358	375	0
78	91	Goodwin Living	VA	1,164	596	234	173	161
79	74	Wesley	WA	1,154	795	251	108	0
80	75	Friendship Villages of St. Louis	MO	1,153	783	136	234	0
81	76	Mather	IL	1,141	1,005	59	77	0
82	77	Legacy Lifecare	MA	1,141	0	361	780	0
83	78	Community Wellness Partners	NY	1,138	124	298	716	0
84	79	Garden Spot Communities	PA	1,130	786	193	151	0
85	81	Ingleside	MD	1,124	834	157	133	0
86	107	Alliance Health & Human Services	MA	1,115	0	77	816	222
87	82	Baruch Senior Ministries	MI	1,114	6	1,108	0	0
88	83	United Methodist Homes	NY	1,080	435	219	426	0
89	84	Brio Living Services	MI	1,073	664	265	144	0
90	85	Pinnacle Living	VA	1,061	544	374	143	0
91	87	Saint Therese	MN	1,041	526	287	228	0
92	88	The United Methodist Retirement Homes, Inc.	NC	1,024	690	140	194	0
93	89	Sequoia Living, Inc.	CA	1,013	799	126	88	0
94	90	Felician Services Inc.	IL	1,006	313	288	405	0
95	92	Tandem Living fka Mennonite Home Communities	PA	997	752	85	160	0
96	93	Presbyterian Communities of South Carolina	SC	987	422	307	258	0
97	94	Providence Life Services	IL	986	614	255	117	0
98	95	The RiverWoods Group	NH	985	699	187	99	0
99	96	Liberty Lutheran Services	PA	978	443	318	217	0
100	97	Givens Communities	NC	950	792	43	115	0

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

Organizational Characteristics: Managed Units & Communities (Continued)

Providers that Manage, Ranked by Market Rate & Managed Units

2025 Combined MR & MGD Rank	2025 LZ 200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	MGD
101	98	Lutheran Life Communities	IL	949	233	213	503	0
102	99	Vista Prairie Communities	MN	939	100	839	0	0
103	101	National Lutheran Communities and Services	MD	932	546	206	180	0
104	143	Community First Solutions	OH	923	220	309	128	266
105	102	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	0
106	103	St. John's Healthcare Corp	NY	916	403	38	475	0
107	104	Christian Health Care Center	NJ	913	514	95	304	0
108	105	Blue Skies of Texas	TX	908	699	129	80	0
109	106	Moorings Park	FL	898	683	109	106	0
110	108	Menno Haven, Inc.	PA	880	497	223	160	0
111	109	Landis Communities	PA	876	614	159	103	0
112	110	United Methodist Communities	NJ	872	88	537	247	0
113	111	Wesley Willows	IL	859	566	202	91	0
114	112	The New Jewish Home	NY	838	24	0	814	0
115	113	Forefront Living	TX	837	548	201	88	0
116	114	Living Branches	PA	834	459	232	143	0
117	115	Lutheran Social Ministries of Maryland	MD	827	622	90	115	0
118	120	St. Ann's Community	NY	809	246	75	448	40
119	116	Ascentria Care Alliance	MA	808	45	90	673	0
120	117	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	0
121	118	Heritage Pointe Communities	IN	785	187	255	343	0
122	119	Westminster-Canterbury on Chesapeake Bay	VA	783	595	80	108	0
123	121	Grace Inspired Ministries	PA	767	451	151	165	0
124	122	United Church of Christ Homes	PA	766	267	124	375	0
125	123	Sunnyside Communities	VA	756	478	151	127	0

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

Organizational Characteristics: Managed Units & Communities (Continued)

Providers that Manage, Ranked by Market Rate & Managed Units

2025 Combined MR & MGD Rank	2025 LZ 200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	MGD
126	124	Unitas Communities fka Morningstar Living / Moravian Manor Communities	PA	753	470	137	146	0
127	125	Messiah Lifeways	PA	753	455	163	135	0
128	126	Episcopal Seniorlife Communities	NY	752	407	193	152	0
129	127	Ohio Masonic Communities	OH	734	351	249	134	0
130	128	Futura Age	WA	733	221	114	398	0
131	129	Simpson Senior Services	PA	727	496	149	82	0
132	130	Bethany Lutheran Homes Inc	WI	726	282	321	123	0
133	131	Emerald Communities	WA	725	527	107	91	0
134	152	Brethren Retirement Community	OH	715	228	199	160	128
135	132	Masonic Homes of Kentucky, Inc	KY	714	449	129	136	0
136	133	Christian Care Communities	KY	713	262	154	297	0
137	175	Bethany St. Joseph Corporation	WI	711	135	158	180	238
138	134	Benevolent Corporation Cedar Community	WI	706	412	219	75	0
139	136	Sunset Manor, Inc.	MI	697	385	312	0	0
140	135	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	0
141	138	Baptist Homes & Healthcare Ministries	MO	680	168	119	393	0
142	139	LutherCare	PA	678	482	110	86	0
143	140	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	0
144	141	Vincentian Collaborative Services	PA	675	66	82	527	0
145	142	Lutheran Life Villages	IN	672	183	164	325	0
146	144	Friends Homes, Inc.	NC	646	445	92	109	0
147	145	Rockwood Retirement Communities	WA	638	445	148	45	0
148	146	Smith Senior Living	IL	636	322	144	170	0
149	147	Wellspring Lutheran Services	MI	635	125	169	341	0
150	148	Eliza Jennings Senior Care Network	OH	628	176	207	245	0

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

Organizational Characteristics: Managed Units & Communities (Continued)

Providers that Manage, Ranked by Market Rate & Managed Units

2025 Combined MR & MGD Rank	2025 LZ 200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	MGD
151	149	Morningside Ministries	TX	625	395	90	140	0
152	170	St. John's United	MT	605	203	201	101	100
153	150	ThriveMore	NC	594	357	136	101	0
154	151	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	0
155	153	Havenwood Heritage Heights	NH	567	367	63	137	0
156	154	Episcopal Communities & Services for Seniors	CA	563	443	120	0	0
157	155	Bethel	NY	563	170	130	263	0
158	156	The Legacy Senior Communities	TX	557	298	145	114	0
159	157	Cardinal Ritter Senior Services	MO	557	205	122	230	0
160	158	Friendly Senior Living	NY	555	298	57	200	0
161	159	Sholom Community Alliance	MN	552	153	142	257	0
162	160	Silverstone Living	NH	550	286	139	125	0
163	161	Ararat Home of Los Angeles	CA	550	73	153	324	0
164	162	Bluestem Communities	KS	549	325	61	163	0
165	163	Church Homes, Inc.	CT	542	319	24	199	0
166	164	Redstone Presbyterian SeniorCare	PA	535	307	151	77	0
167	165	Episcopal Retirement Services	OH	522	309	75	138	0
168	166	Christian Village Communities	OH	521	189	182	150	0
169	167	Willow Brook Christian Communities	OH	518	267	167	84	0
170	168	CRISTA Senior Living	WA	517	374	143	0	0
171	169	Medford Leas	NJ	514	395	105	14	0
172	171	Judson Services, Inc.	OH	500	227	135	138	0
173	172	The Village of St. Edward	OH	492	126	285	81	0
174	173	Convivial Life, Inc.	FL	488	307	181	0	0
175	174	St. Paul's Senior Services	CA	484	243	182	59	0

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

Organizational Characteristics: Managed Units & Communities (Continued)

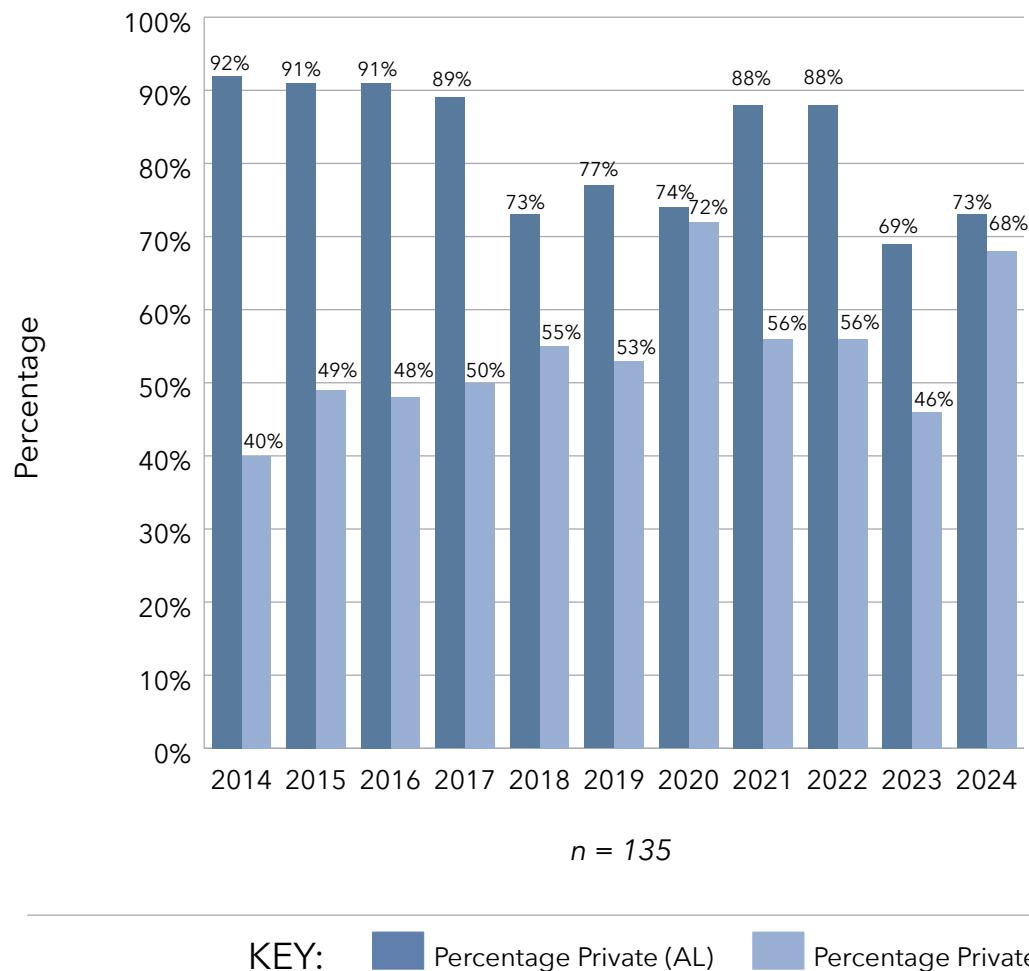
Providers that Manage, Ranked by Market Rate & Managed Units

2025 Combined MR & MGD Rank	2025 LZ 200 Rank	System Name	State	Units (as of 12/31/24)				
				Total	ILU	ALU	NCB	MGD
176	176	Deaconess Abundant Life Communities	MA	469	283	144	42	0
177	177	The Loomis Communities, Inc.	MA	468	368	58	42	0
178	179	Resthaven	MI	466	183	138	145	0
179	178	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	0
180	198	Trinity Senior Services fka Milwaukee Catholic Home	WI	458	205	74	107	72
181	180	Taylor Community	NH	457	310	147	0	0
182	182	Guardian Angels Senior Services	MN	451	36	295	120	0
183	181	Baptist Senior Family	PA	451	326	62	63	0
184	183	Michigan Masonic Homes	MI	442	38	155	249	0
185	184	Bethesda	MN	430	89	93	248	0
186	185	Allegheny Lutheran Social Ministries	PA	428	173	103	152	0
187	187	Lutheran Home & Harwood Place	WI	427	169	98	160	0
188	186	Good Shepherd Communities	NY	427	194	67	166	0
189	188	Skaalen Retirement Services	WI	421	229	101	91	0
190	189	Wesbury UMC	PA	418	117	91	210	0
191	190	A.G. Rhodes	GA	416	0	0	416	0
192	191	Jewish Senior Life of Metropolitain of Detroit	MI	415	294	121	0	0
193	192	Parker Health Group	NJ	407	0	60	347	0
194	193	Beechwood Continuing Care, Inc.	NY	406	186	0	220	0
195	194	CJE SeniorLife	IL	405	240	165	0	0
196	195	Oaknoll	IA	397	301	38	58	0
197	196	Canterbury Woods	NY	394	296	48	50	0
198	197	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	0
199	199	Pleasant View Communities	PA	380	229	59	92	0
200	200	HutsonWood	TN	371	0	72	299	0

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

Organizational Characteristics: Assisted and Skilled Composition

Percentage That Offer Private Versus Semi-Private Units



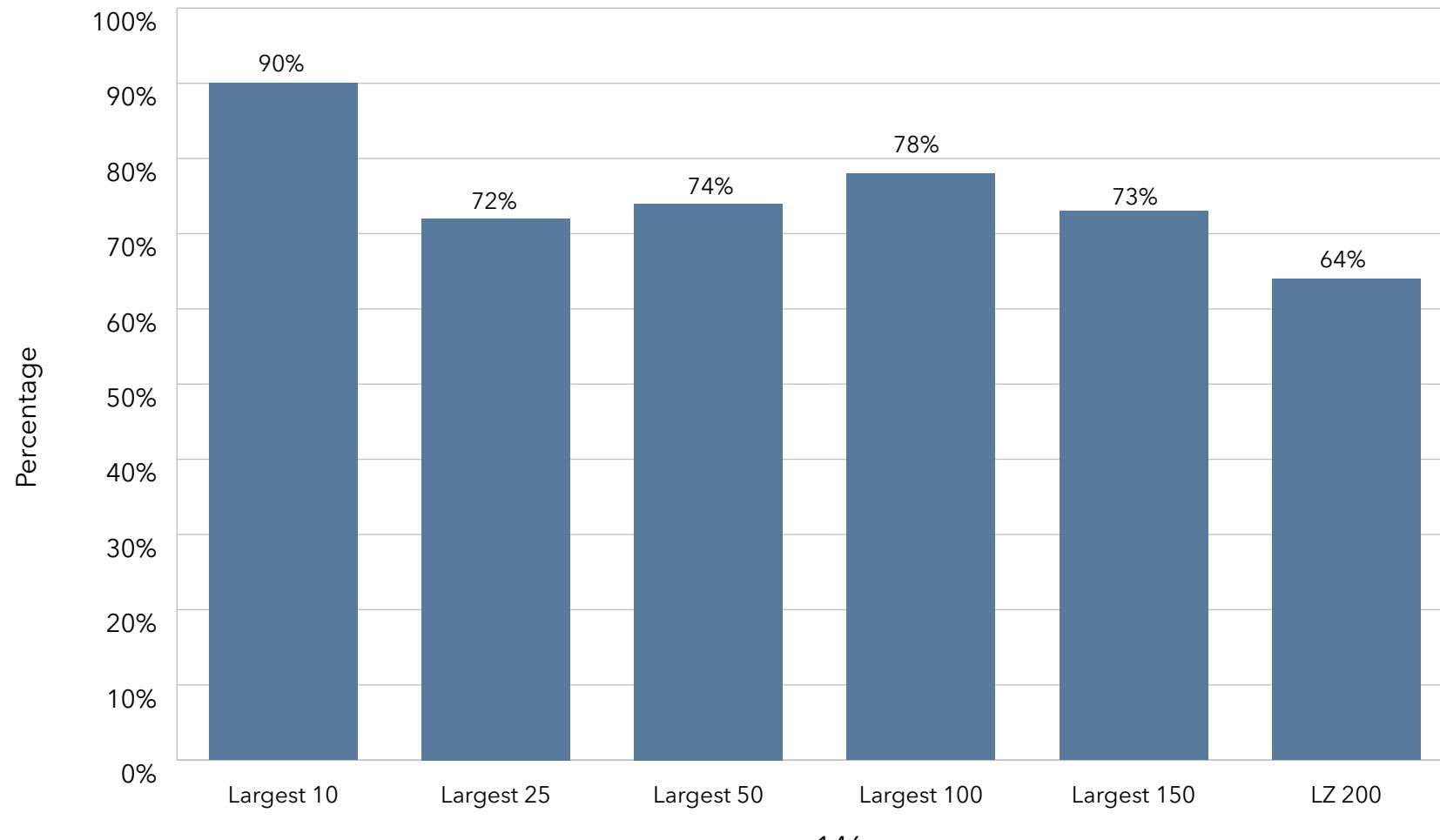
Assisted and Skilled Composition

This report has tracked the proportion of assisted living and skilled nursing units that are private. There is a clear trend toward private assisted living units, with 73% being private. On the other hand, 68% of the skilled nursing units are private.

This year's publication is the eleventh in which the percentage of LZ 200 organizations that own and operate memory support (MS) units is analyzed. Section 4-17 details the percentage of LZ 200, by the largest 10, 25, 50, 100, 150, and 200, that offer specialized memory support units. Roughly 64% of the organizations offer memory support, with more than 22% offering both assisted living and skilled nursing memory care services. An additional 38% offer only assisted living memory support.

Organizational Characteristics: Assisted and Skilled Composition

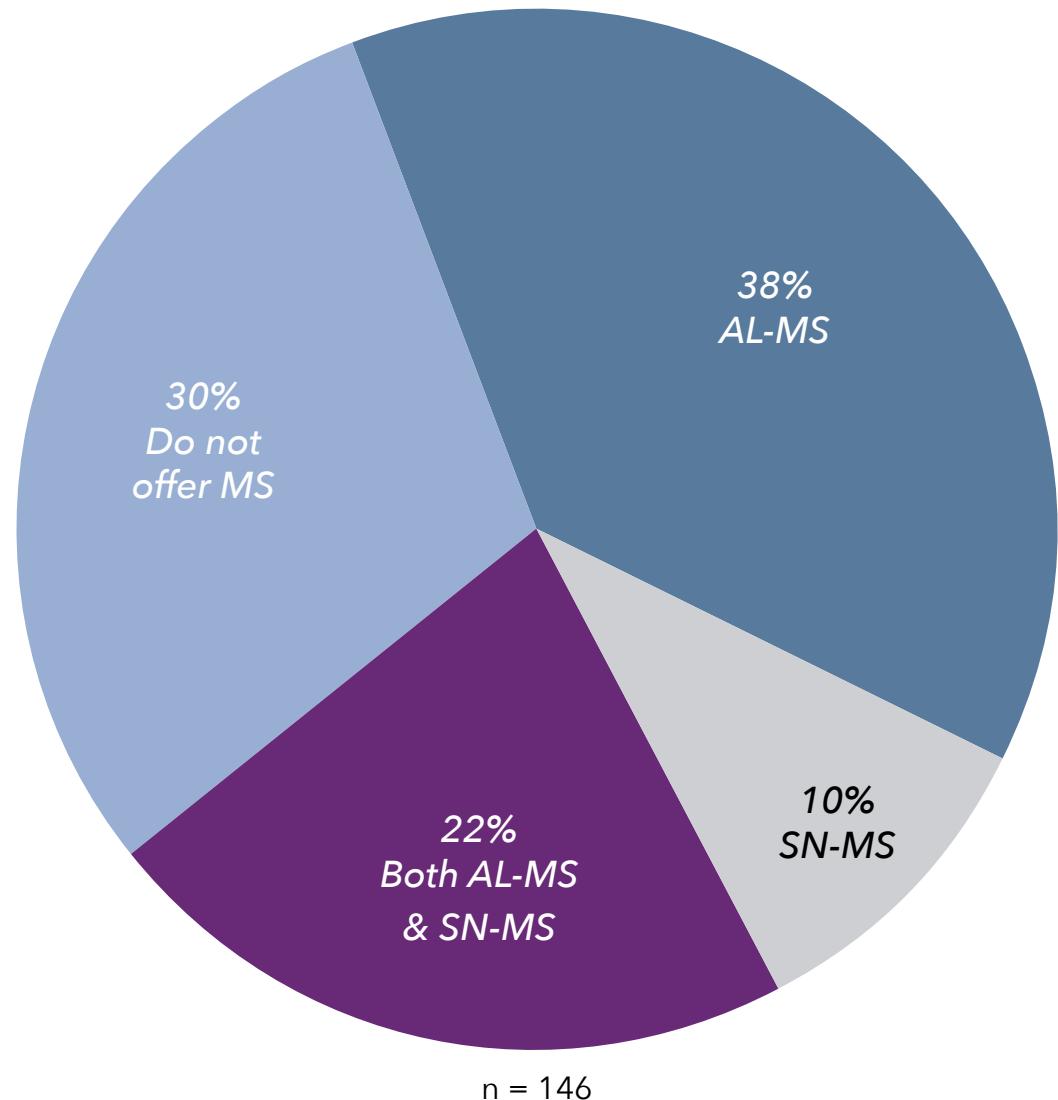
Percentage That Offer Memory Support



KEY: █ Offer Memory Support

Organizational Characteristics: Assisted and Skilled Composition

Type of Memory Support Offered

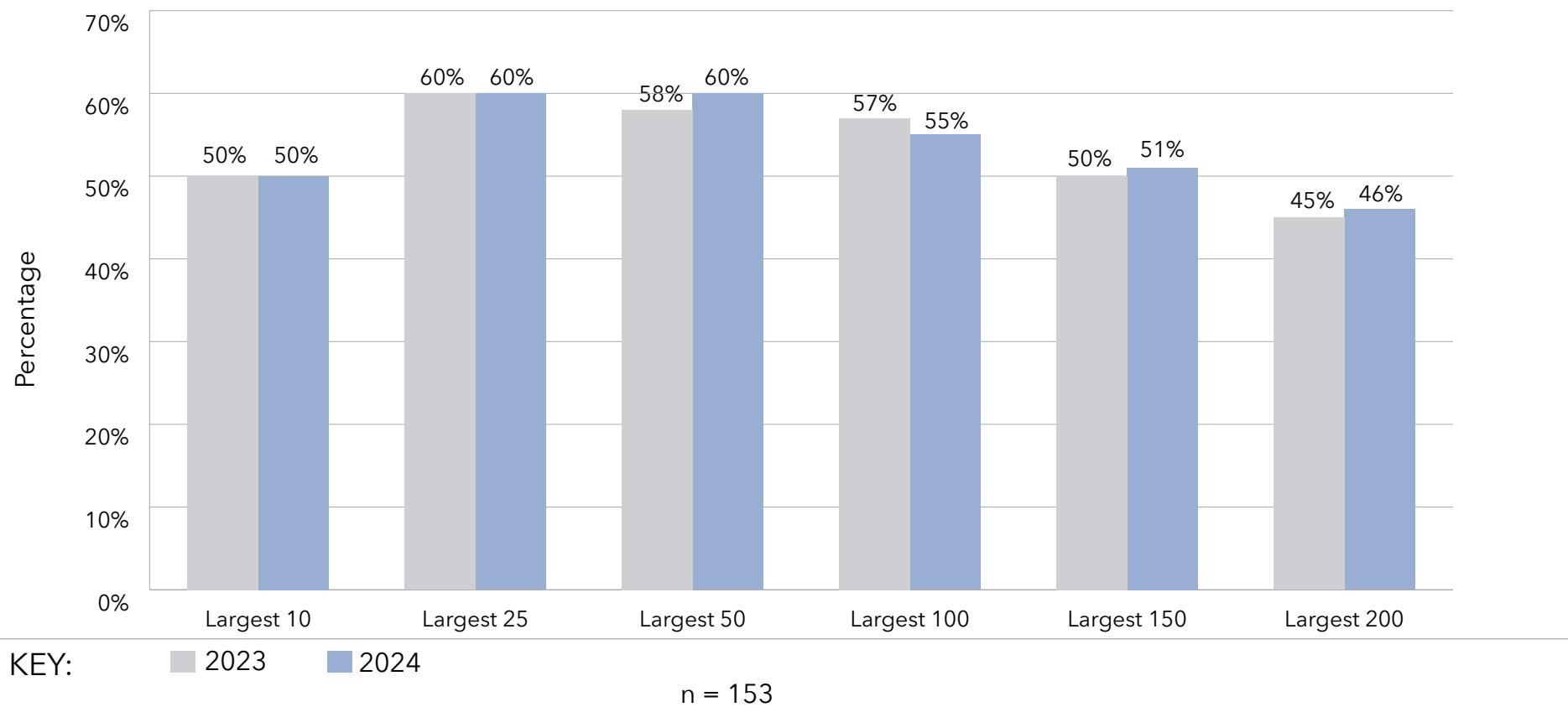


Organizational Characteristics: Home & Community-Based Services

Percentage Offering HCBS to Non-Residents

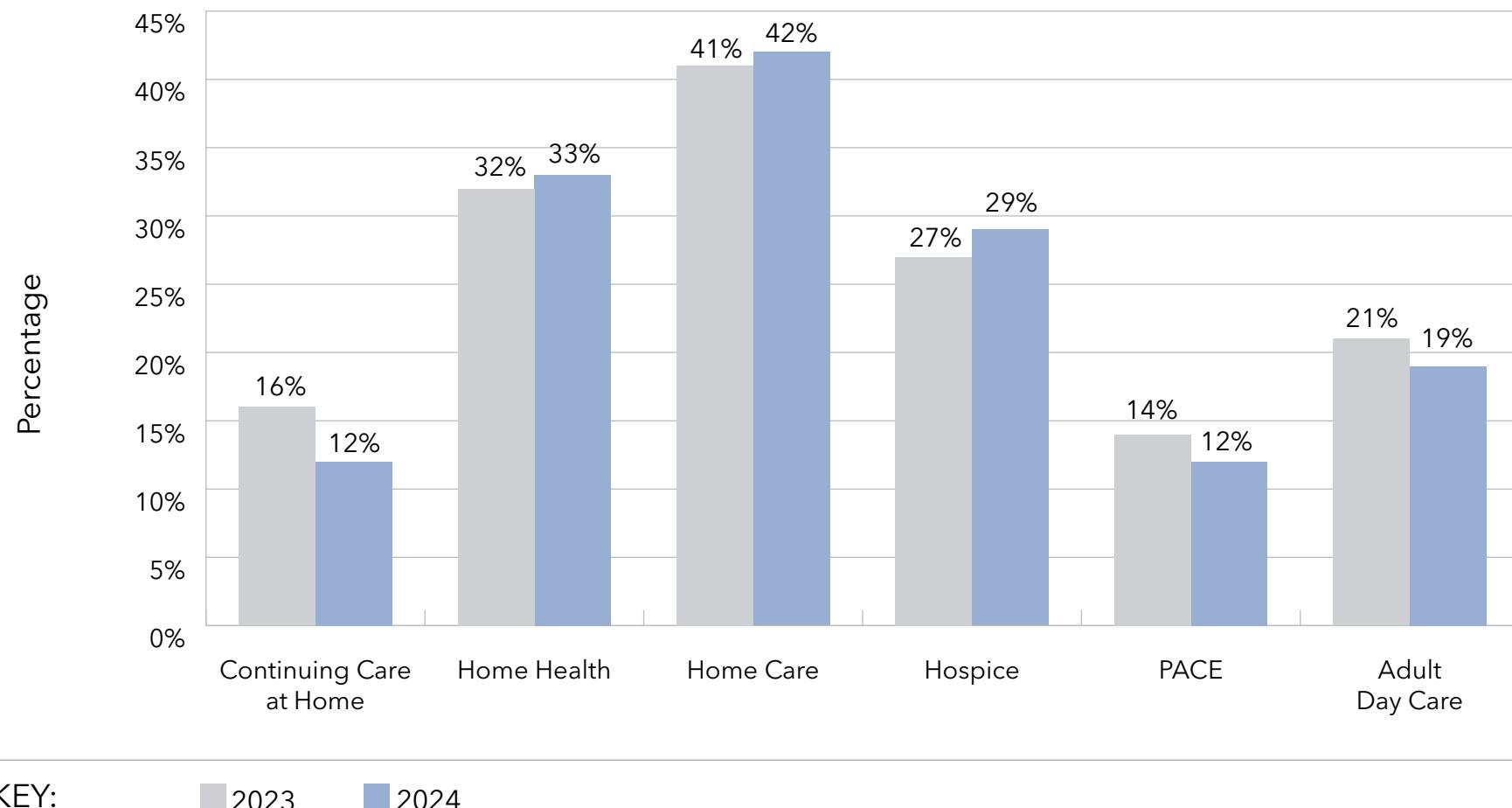
Home and Community-Based Services (HCBS)

Again this year, the survey gathered overall feedback on the percentage of providers offering home and community-based services, and specifically drilled down into Continuing Care at Home (CCaH), Program of All-Inclusive Care for the Elderly (PACE), and hospice services for individuals in the greater community. Overall, 46% of the LZ 200 organizations offer home and community-based services to non-residents. CCaH, a model that grew in popularity several years ago, is offered by 12% of the LZ 200. Approximately 12% have PACE programs, and hospice services are being provided by 29%.



Organizational Characteristics: Home & Community-Based Services

Offering: PACE, CCaH, External Hospice & Other Home Care



Organizational Characteristics: Home & Community-Based Services

HCBS Providers with \$10 Million+ in HCBS Revenue

2025 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
1	Trinity Health Senior Communities	MI	>\$50 million
2	Presbyterian Villages of Michigan	MI	>\$50 million
3	Holland Home	MI	>\$50 million
4	Concordia Lutheran Ministries	PA	>\$50 million
5	Brio Living Services	MI	>\$50 million
6	Ohio Living Communities	OH	>\$50 million
7	ArchCare	NY	>\$50 million
8	Masonicare	CT	\$25-\$50 Million
9	National Senior Communities	DC	\$25-\$50 Million
10	BHI Senior Living, Inc.	IN	\$25-\$50 Million
11	EveryAge	NC	\$25-\$50 Million
12	Vivie fka KNWM (Knuite Nelson / Walker Methodist)	MN	\$25-\$50 Million
13	National Church Residences	OH	\$25-\$50 Million
14	Presbyterian Homes & Services	MN	\$25-\$50 Million
15	St. Francis Health Services of Morris, Inc.	MN	\$25-\$50 Million
16	Ecumen	MN	\$25-\$50 Million
17	Felician Services Inc.	IL	\$25-\$50 Million
18	Goodwin Living	VA	\$10-\$24 million
19	Community First Solutions	OH	\$10-\$24 million
20	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	\$10-\$24 million
21	Forefront Living	TX	\$10-\$24 million
22	Transforming Age	WA	\$10-\$24 million
23	Covenant Living Communities and Services	IL	\$10-\$24 million
24	Illuminus, Inc.	WI	\$10-\$24 million
25	Eventide and Tabitha	MN	\$10-\$24 million

n = 85

Reflects revenues for those who provided their information.

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

HCBS Providers with <\$10 Million in HCBS Revenue

2025 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
26	Westminster-Canterbury on Chesapeake Bay	VA	\$10-\$24 million
27	Saint Therese	MN	\$10-\$24 million
28	Hebrew SeniorLife	MA	\$10-\$24 million
29	FellowshipLIFE, Inc.	NJ	\$10-\$24 million
30	Otterbein SeniorLife	OH	\$10-\$24 million
31	Lutheran Homes of South Carolina Inc.	SC	\$10-\$24 million
32	Moorings Park	FL	\$10-\$24 million
33	Wesley	WA	\$10-\$24 million
34	Lutheran SeniorLife	PA	\$10-\$24 million
35	The Legacy Senior Communities	TX	\$10-\$24 million
36	Springpoint Senior Living, Inc.	NJ	<\$10 million
37	Providence Life Services	IL	<\$10 million
38	Friendship Villages of St. Louis	MO	<\$10 million
39	EverTrue fka Lutheran Senior Services	MO	<\$10 million
40	HumanGood	CA	<\$10 million
41	Masonic Villages of the Grand Lodge of Pennsylvania	PA	<\$10 million
42	Alliance Health & Human Services	MA	<\$10 million
43	Presbyterian SeniorCare Network	PA	<\$10 million
44	Bethesda Health Group, Inc.	MO	<\$10 million
45	Redstone Presbyterian SeniorCare	PA	<\$10 million
46	Benedictine	MN	<\$10 million
47	Community Wellness Partners	NY	<\$10 million
48	Parker Health Group	NJ	<\$10 million
49	Baptist Village Communities	OK	<\$10 million

n = 85

Reflects revenues for those who provided their information.

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

HCBS Providers with <\$10 Million in HCBS Revenue

2025 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
50	Kintura fka Brightspire and Well-Spring Group	NC	<\$10 million
51	St. John's United	MT	<\$10 million
52	Sunnyside Communities	VA	<\$10 million
53	Christian Health Care Center	NJ	<\$10 million
54	Lutheran Life Communities	IL	<\$10 million
55	Eliza Jennings Senior Care Network	OH	<\$10 million
56	St. Ann's Community	NY	<\$10 million
57	Givens Communities	NC	<\$10 million
58	Messiah Lifeways	PA	<\$10 million
59	United Methodist Communities	NJ	<\$10 million
60	Christian Living Communities	CO	<\$10 million
61	Landis Communities	PA	<\$10 million
62	Ingleside	MD	<\$10 million
63	Sun Health	AZ	<\$10 million
64	Menno Haven, Inc.	PA	<\$10 million
65	Unitas Communities fka Morningstar Living / Moravian Manor Communities	PA	<\$10 million
66	National Lutheran Communities and Services	MD	<\$10 million
67	Wesbury UMC	PA	<\$10 million
68	Eskaton	CA	<\$10 million
69	Lutheran Services Carolinas	NC	<\$10 million
70	Garden Spot Communities	PA	<\$10 million
71	Christian Care Companies	AZ	<\$10 million
72	Masonic Homes of Kentucky, Inc	KY	<\$10 million

n = 85

Reflects revenues for those who provided their information.

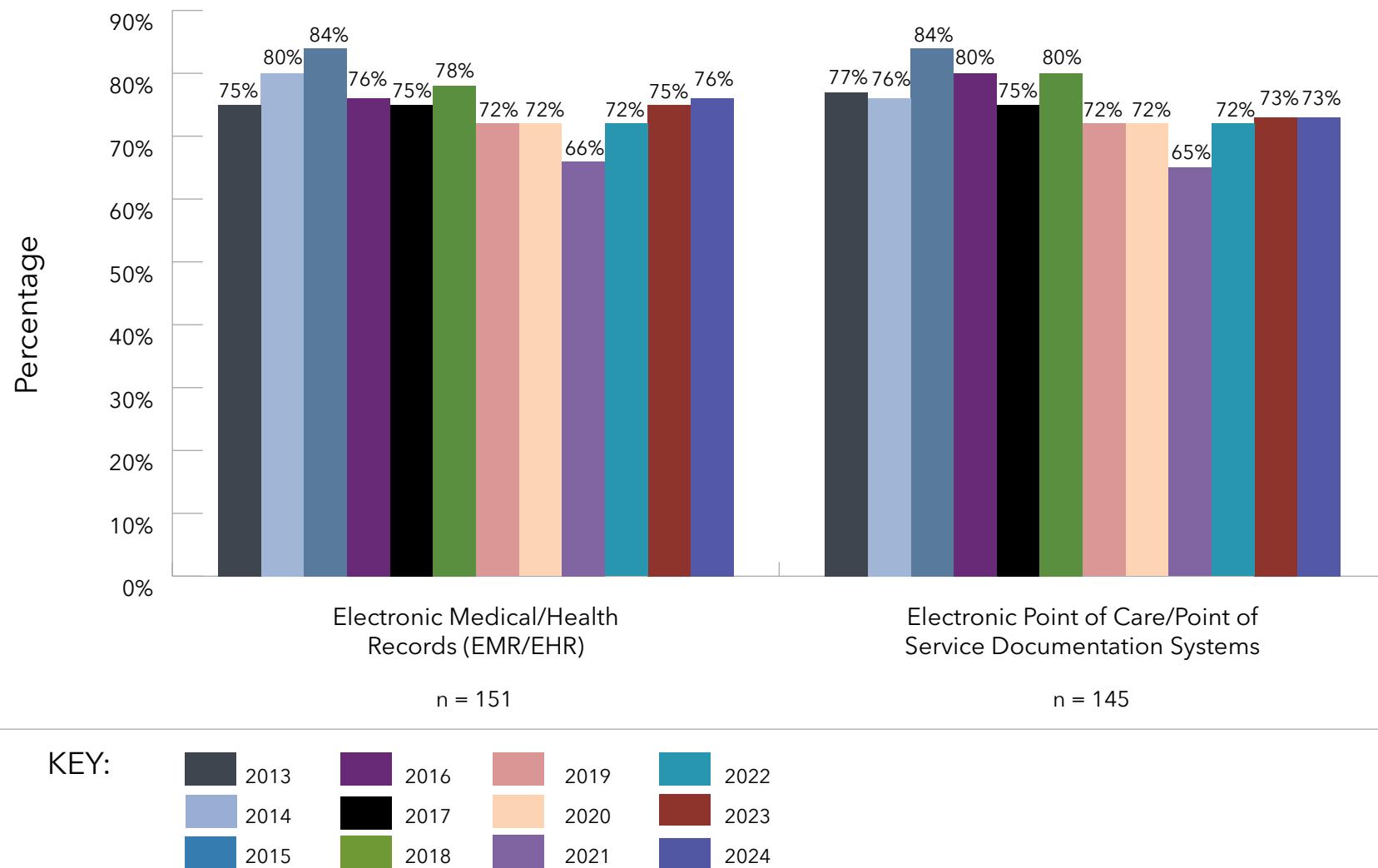
Organizational Characteristics: Home & Community-Based Services (Continued)

HCBS Providers with <\$10 Million in HCBS Revenue

2025 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
73	Presbyterian Manors of Mid-America, Inc.	KS	<\$10 million
74	United Methodist Homes	NY	<\$10 million
75	The Loomis Communities, Inc.	MA	<\$10 million
76	United Church Homes, Inc.	OH	<\$10 million
77	Simpson Senior Services	PA	<\$10 million
78	Life Enriching Communities	OH	<\$10 million
79	Asbury Communities, Inc.	MD	<\$10 million
80	Bluestem Communities	KS	<\$10 million
81	Bethany St. Joseph Corporation	WI	<\$10 million
82	Sunset Manor, Inc.	MI	<\$10 million
83	Lutheran Life Villages	IN	<\$10 million
84	Trinity Senior Services fka Milwaukee Catholic Home	WI	<\$10 million
85	Lutheran Home & Harwood Place	WI	<\$10 million

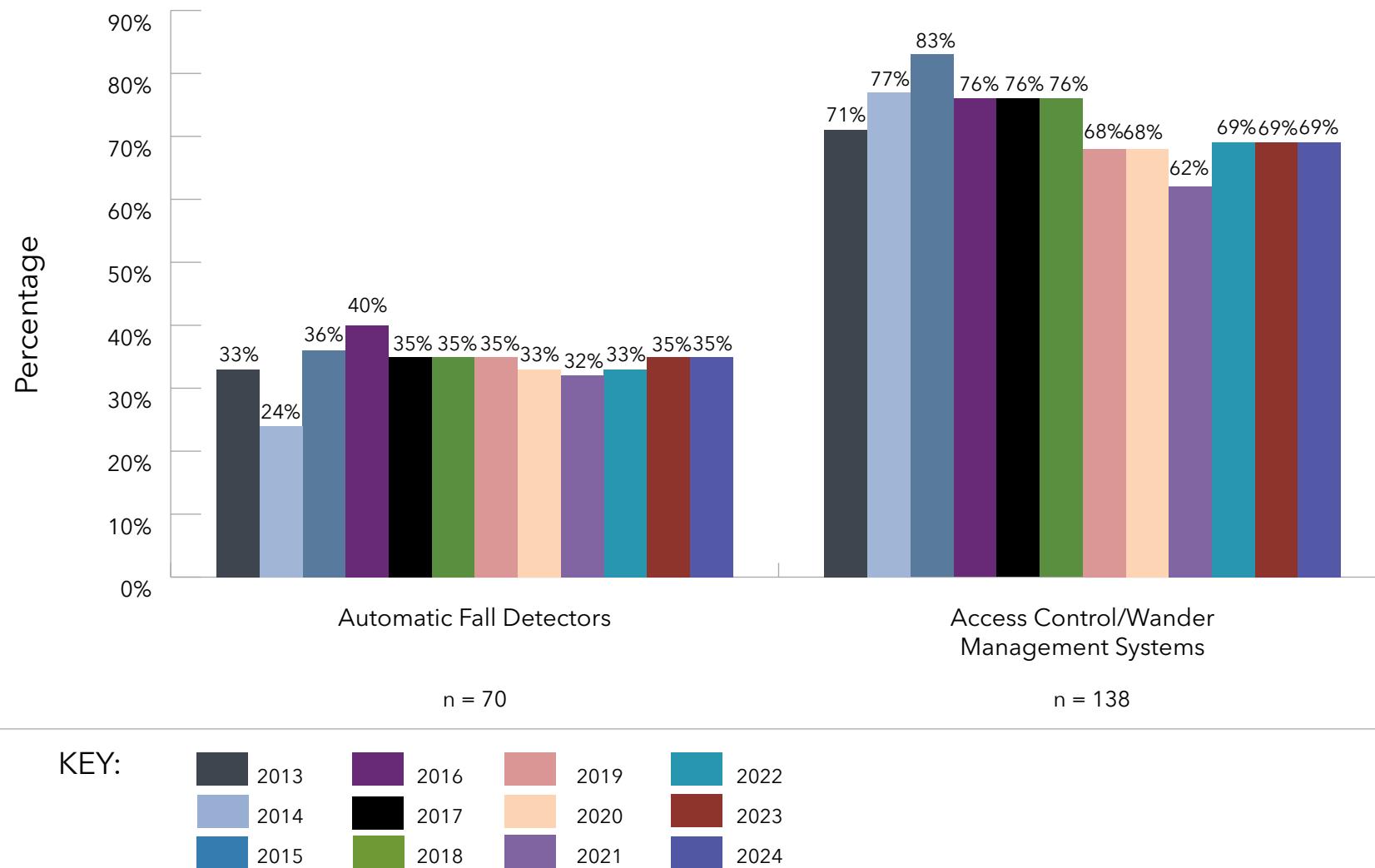
Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Electronic Documentation Technologies



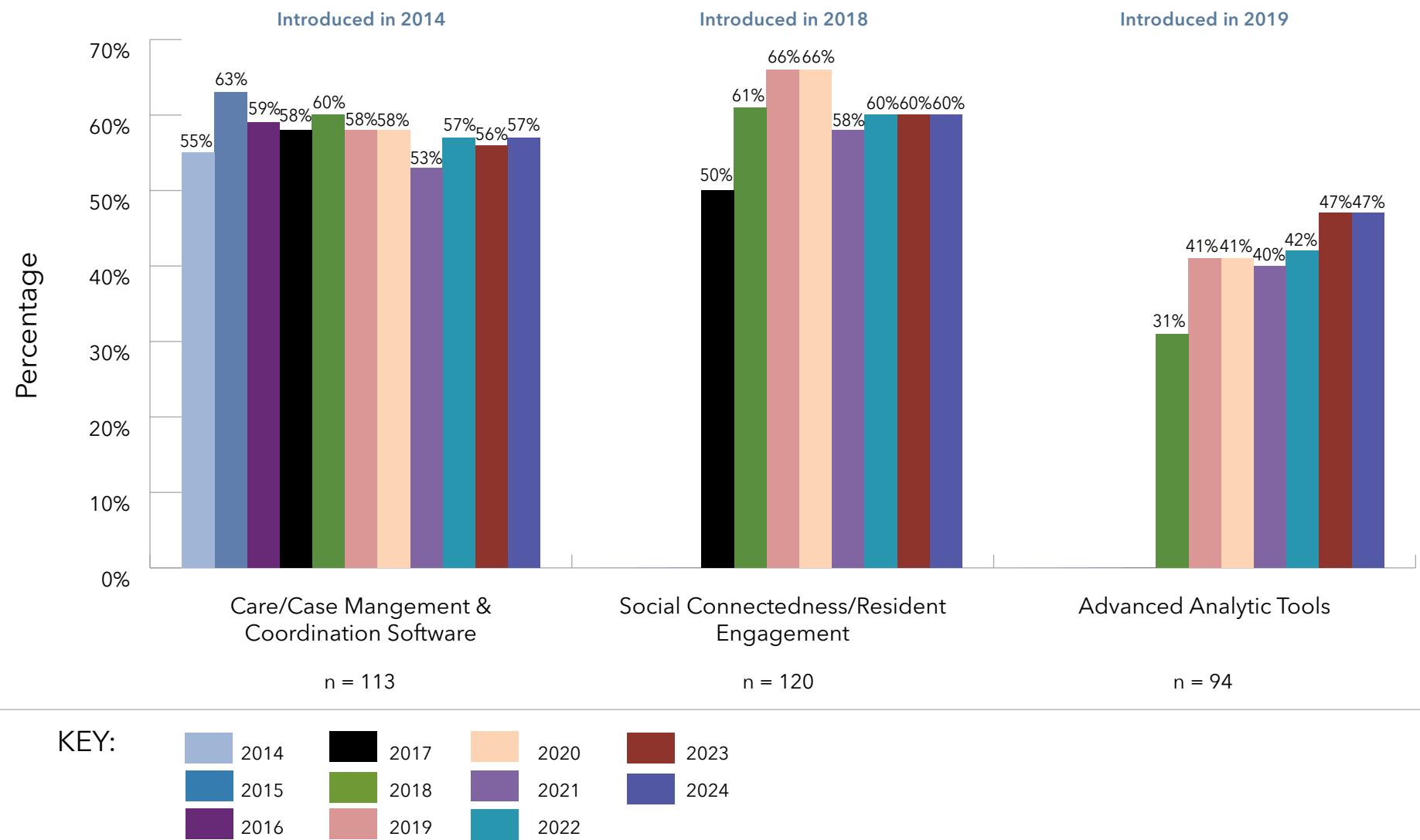
Organizational Characteristics: Technology Adoption

Percentage Communities/Operations Using Safety Monitoring Technologies



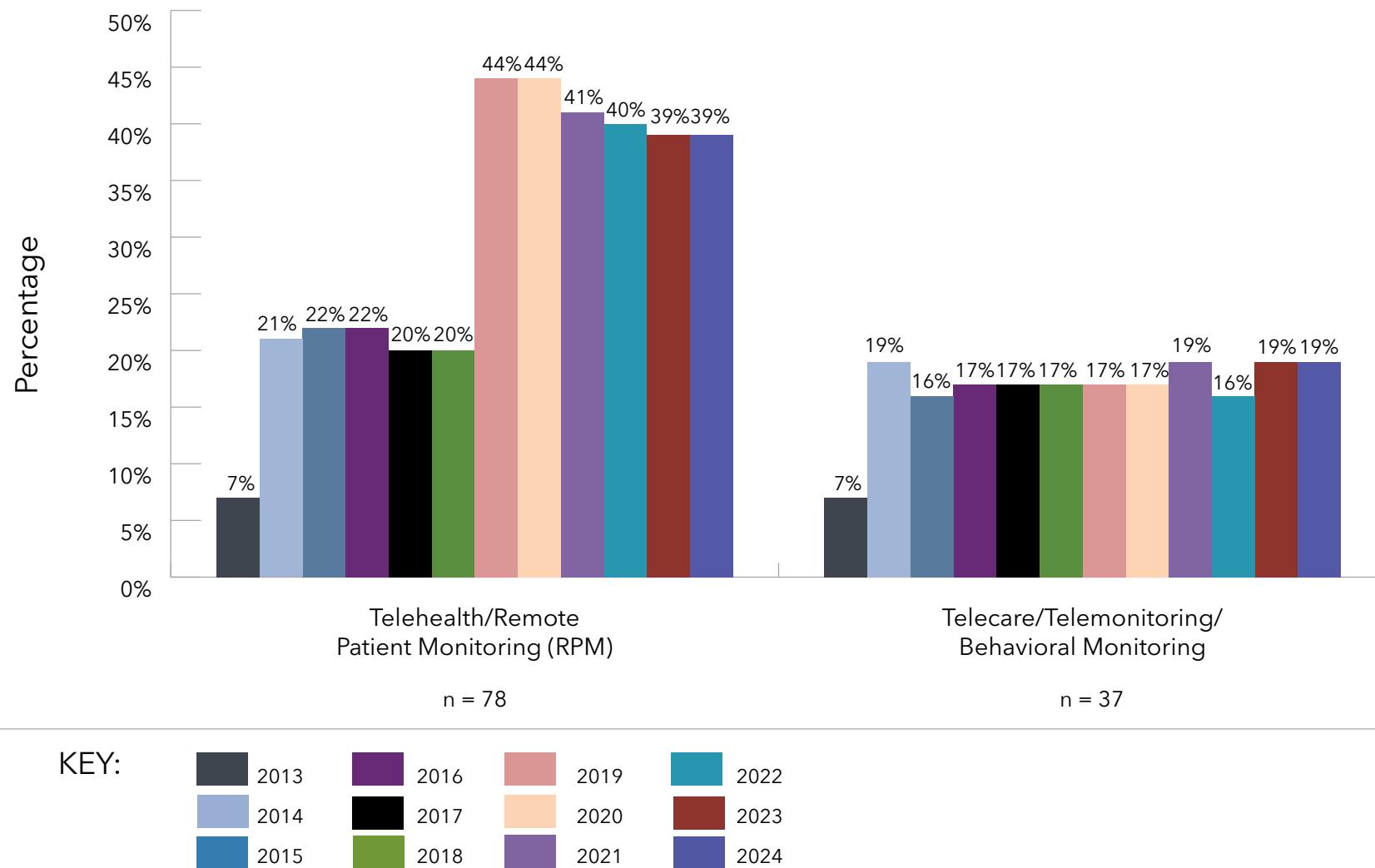
Organizational Characteristics: Technology Adoption

Percentage of Coordination Software & Resident Engagement Technologies



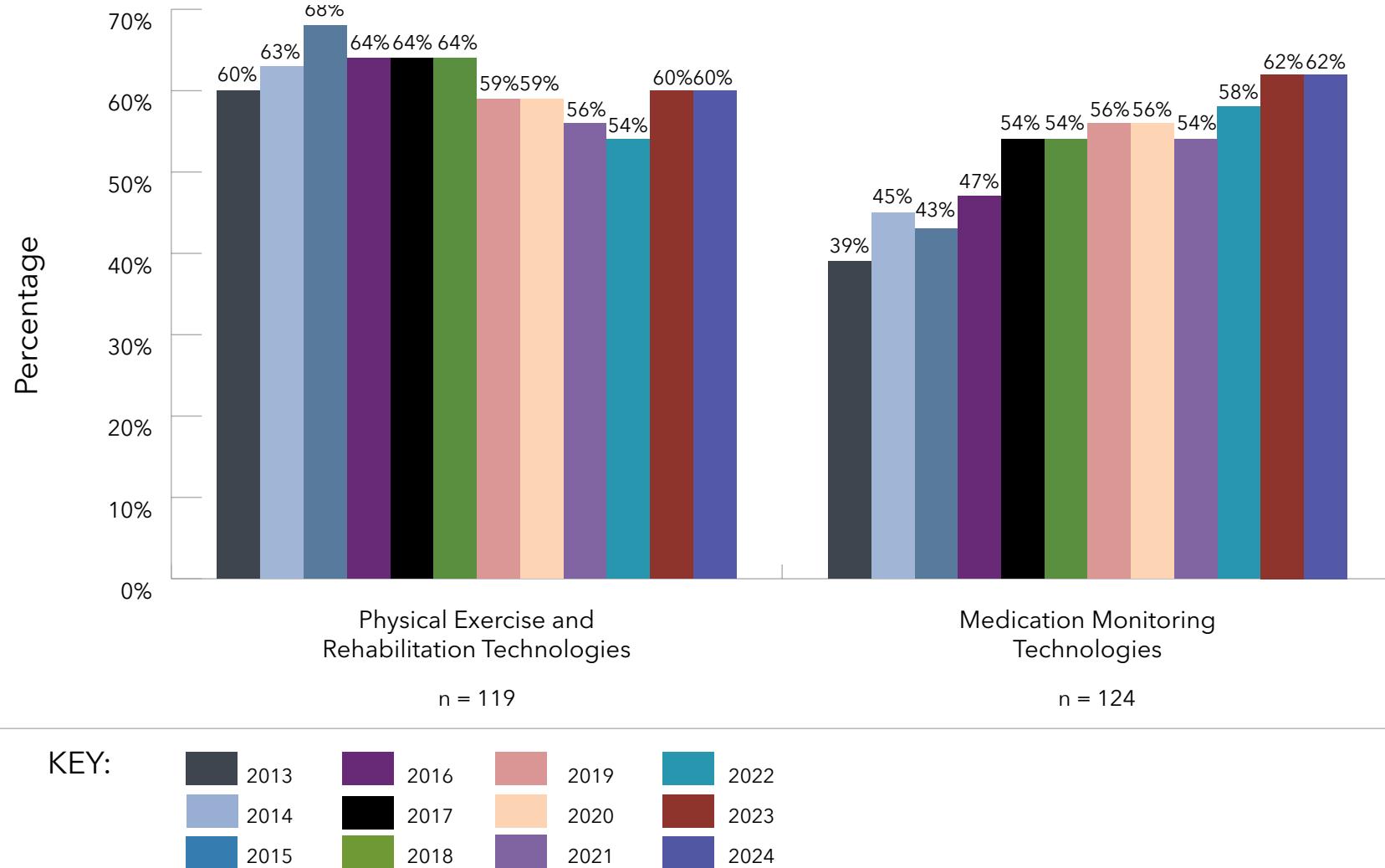
Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies



Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies



Organizational Characteristics: Technology Adoption

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



Organizational Characteristics: Technology Adoption

Type of EMR/EHR Technology

Type of EMR/EHR Technology	
Most Mentions	# of Mentions
PointClickCare	88
MatrixCare	40
Netsmart/MyUnity	25
Eldermark	5
American Data	3
Other	21

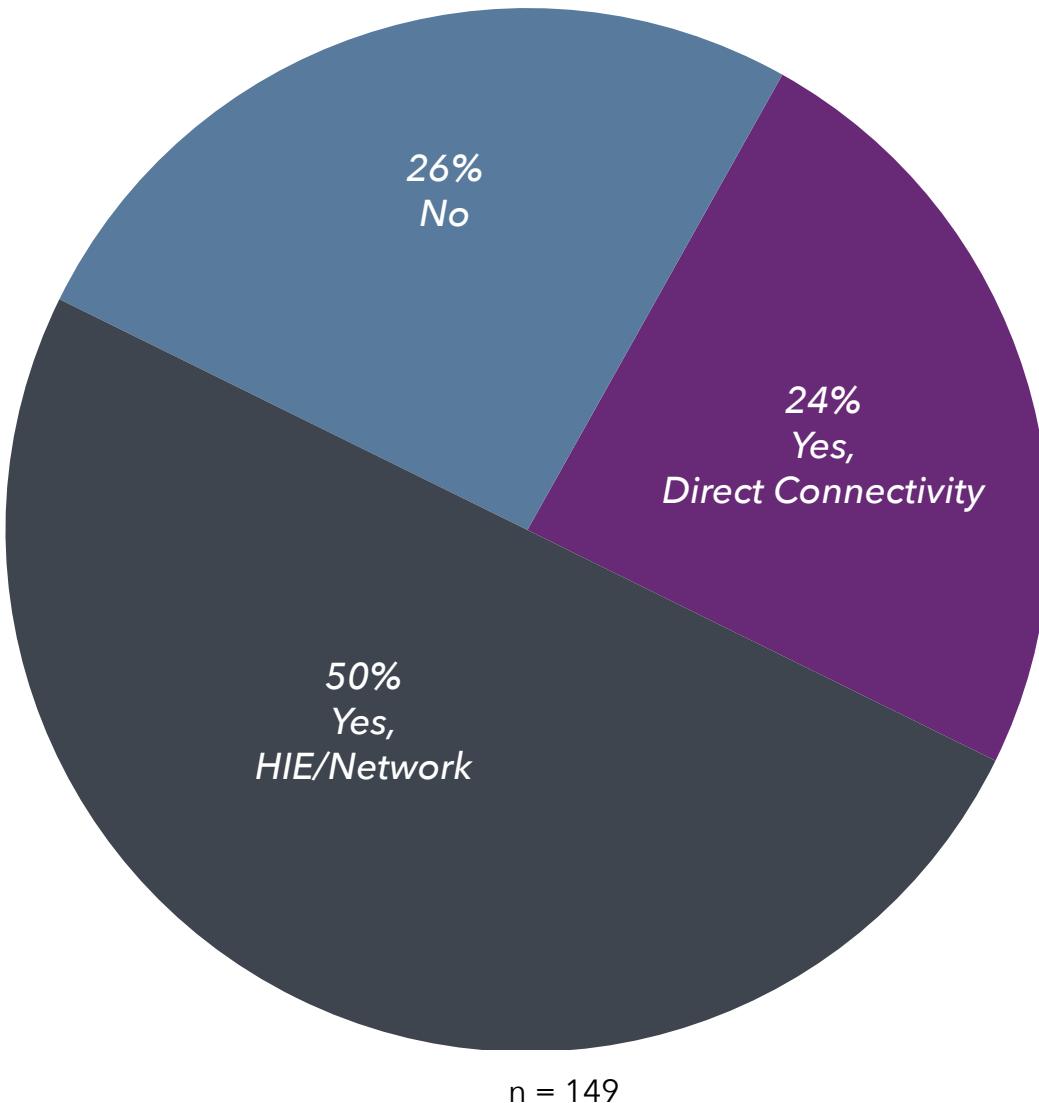
n = 146

146 responses, but multiple mentions

Technology

Beginning with the 2013 LZ 100, information was gathered regarding the adoption of various aging-related technologies. The technology findings are integrated into section 4-19. The majority of LZ 200 organizations, 69% respectively, reported adopting Access Control/Wander Management Systems. Additional detailed findings are reported throughout that section. Data was once again gathered this year for single-site organizations. Chapter 6 reveals the proportion of those organizations who have adopted various technologies.

Organizational Characteristics: Technology Adoption *Health Information Exchange*



Organizational Characteristics: Technology Adoption

Type of Physical Robot

Adoption of Physical Robots by Type	
Most Mentions	# of Mentions
Bear Robotics Inc./Servi	19
ICE Cobotics	3
Staff Augmentation Robotic Assistant	3
Power Automate	2
Roomba (Commercial Grade)	2
Microsoft Dynamics 365	1
Omnicell	1
RichTech	1

Robotic Technology

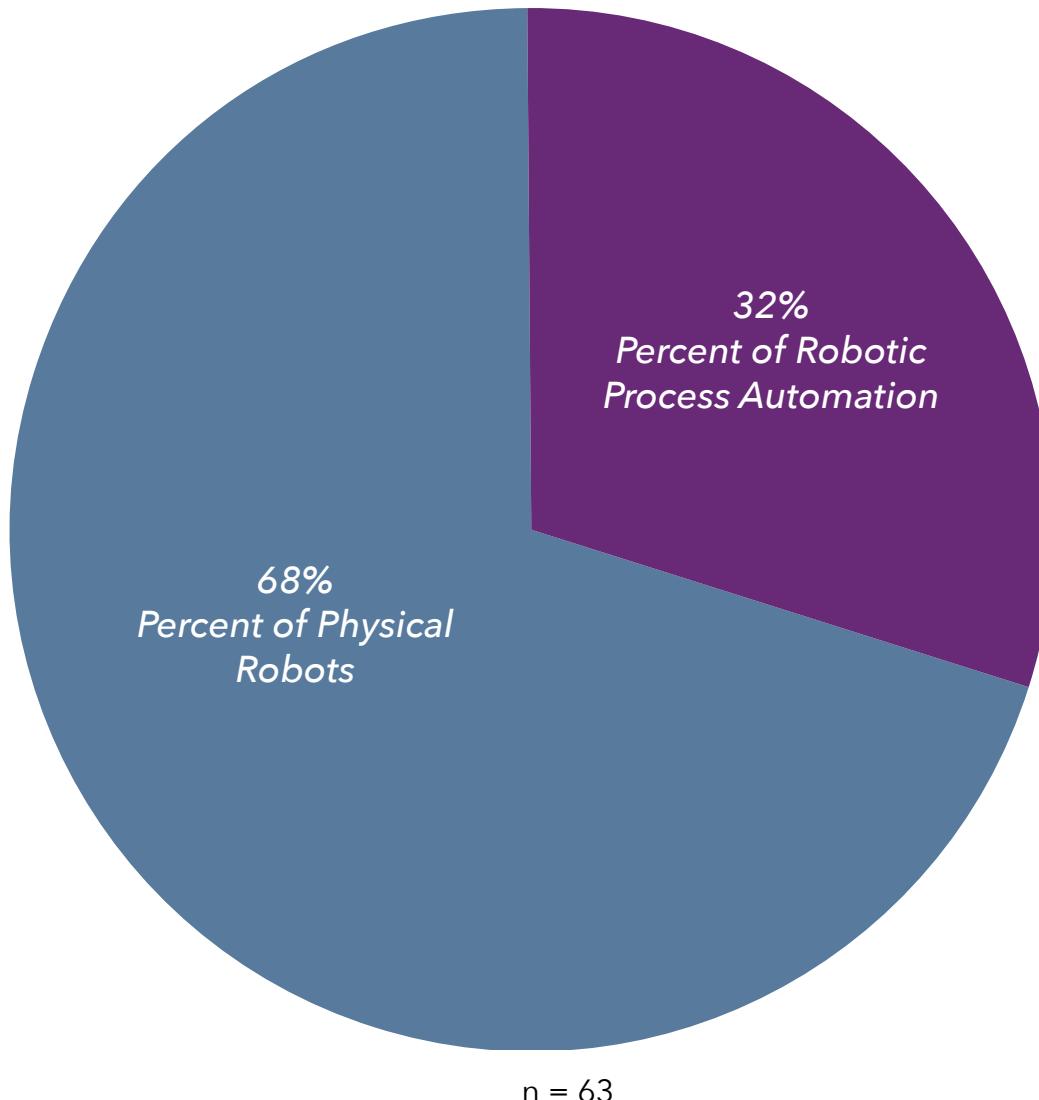
Adoption of robotic solutions utilized in community operations.

n = 28

28 responses, but multiple mentions

Organizational Characteristics: Technology Adoption

Robotic Technology

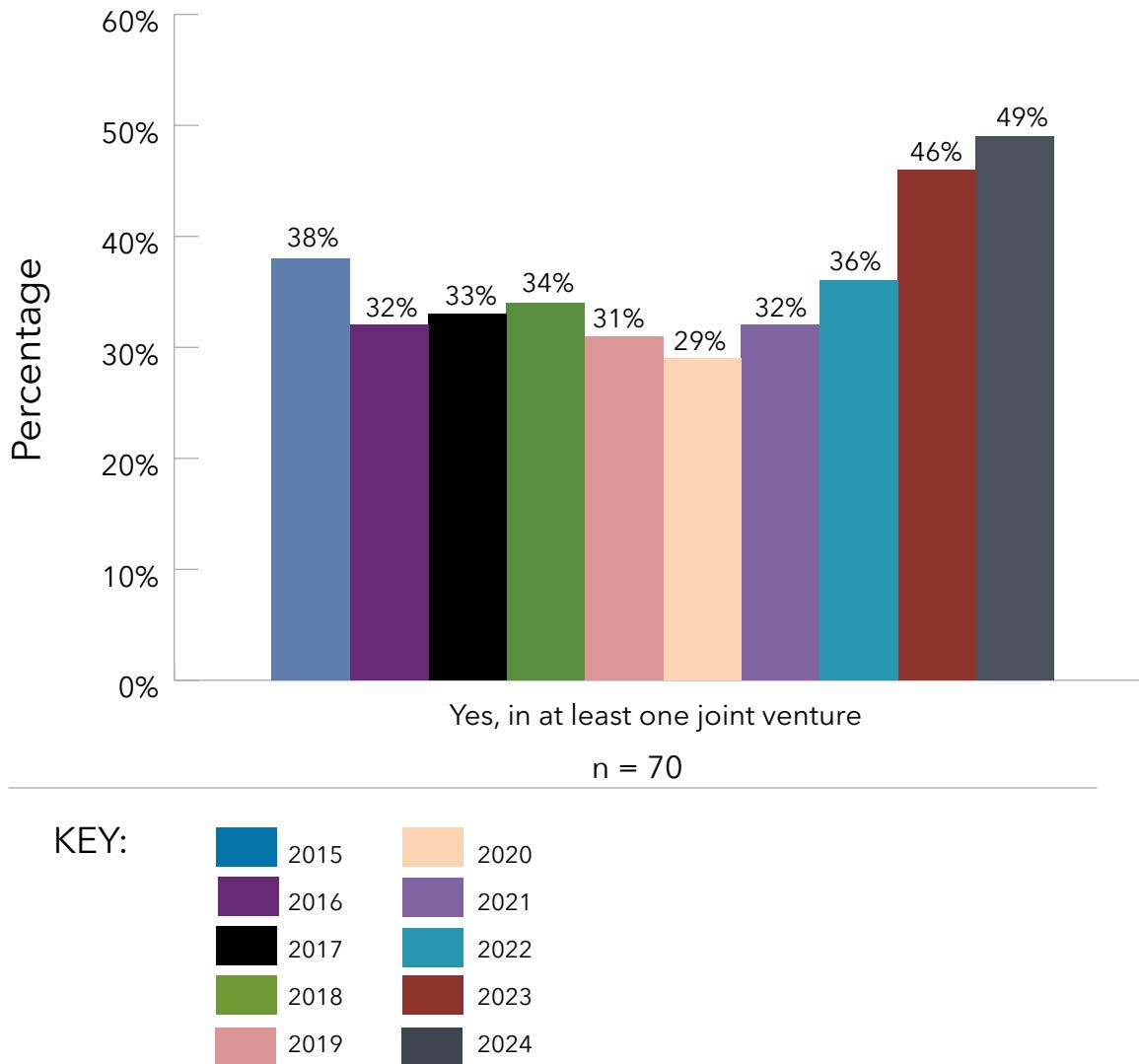


Organizational Characteristics: Joint Ventures

Percentage Engaged in a Joint Venture

Joint Ventures

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



Organizational Characteristics: Joint Ventures

Type of Joint Venture

Type of Joint Venture	
Most Mentions	# of Mentions
Another NFP Senior Living Provider	72
Home Health/Home Care	44
Hospital/Health System/Mobile Medical	26
Physician's Group	23
Hospice	21
HUD/Affordable Housing	18
PACE	13
Case Management	12
Rehabilitation/Therapy	10
Church/University	6
Pharmacy	5

n = 70

70 responses, but multiple mentions

Chapter 5

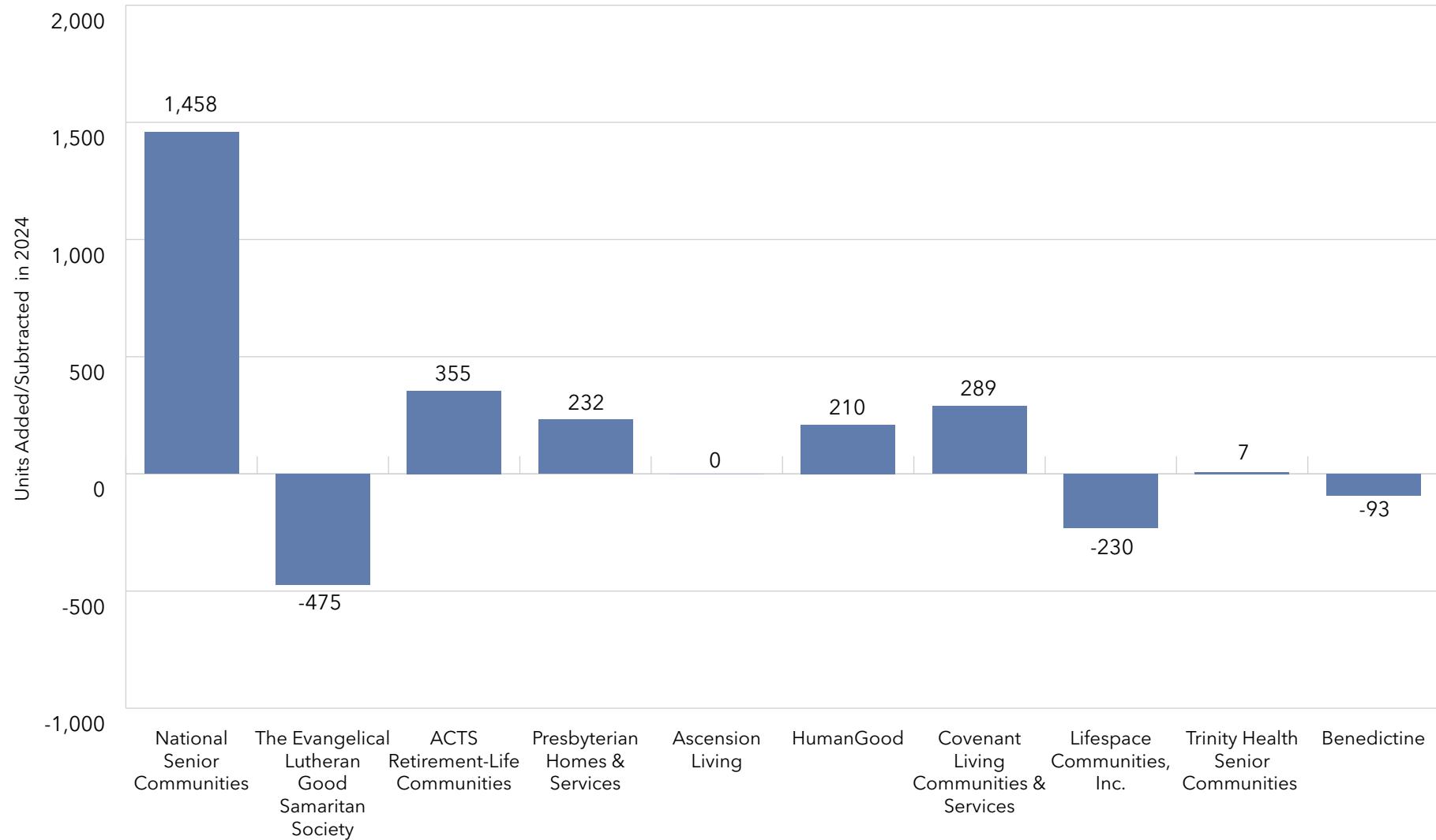
Growth and Change

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

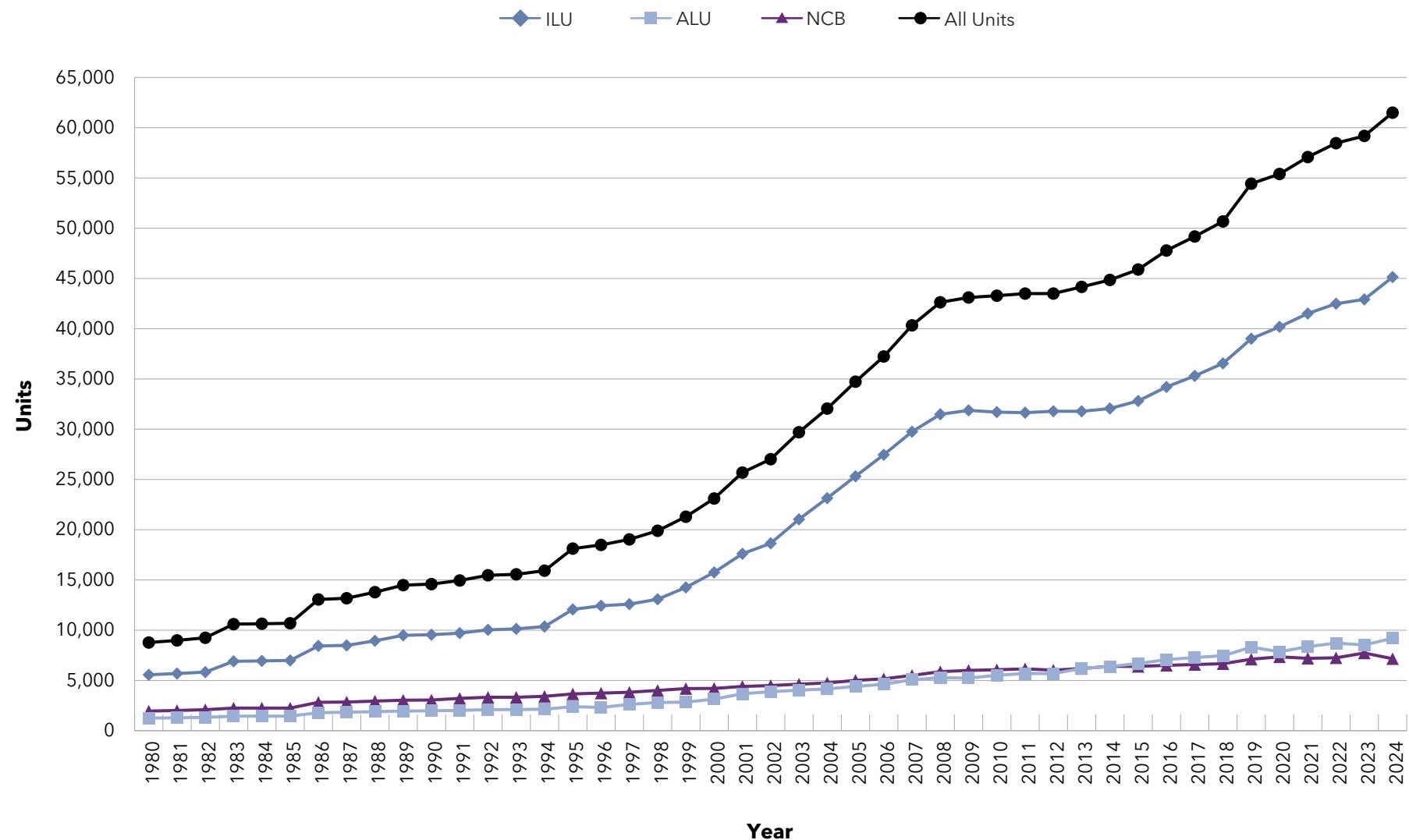




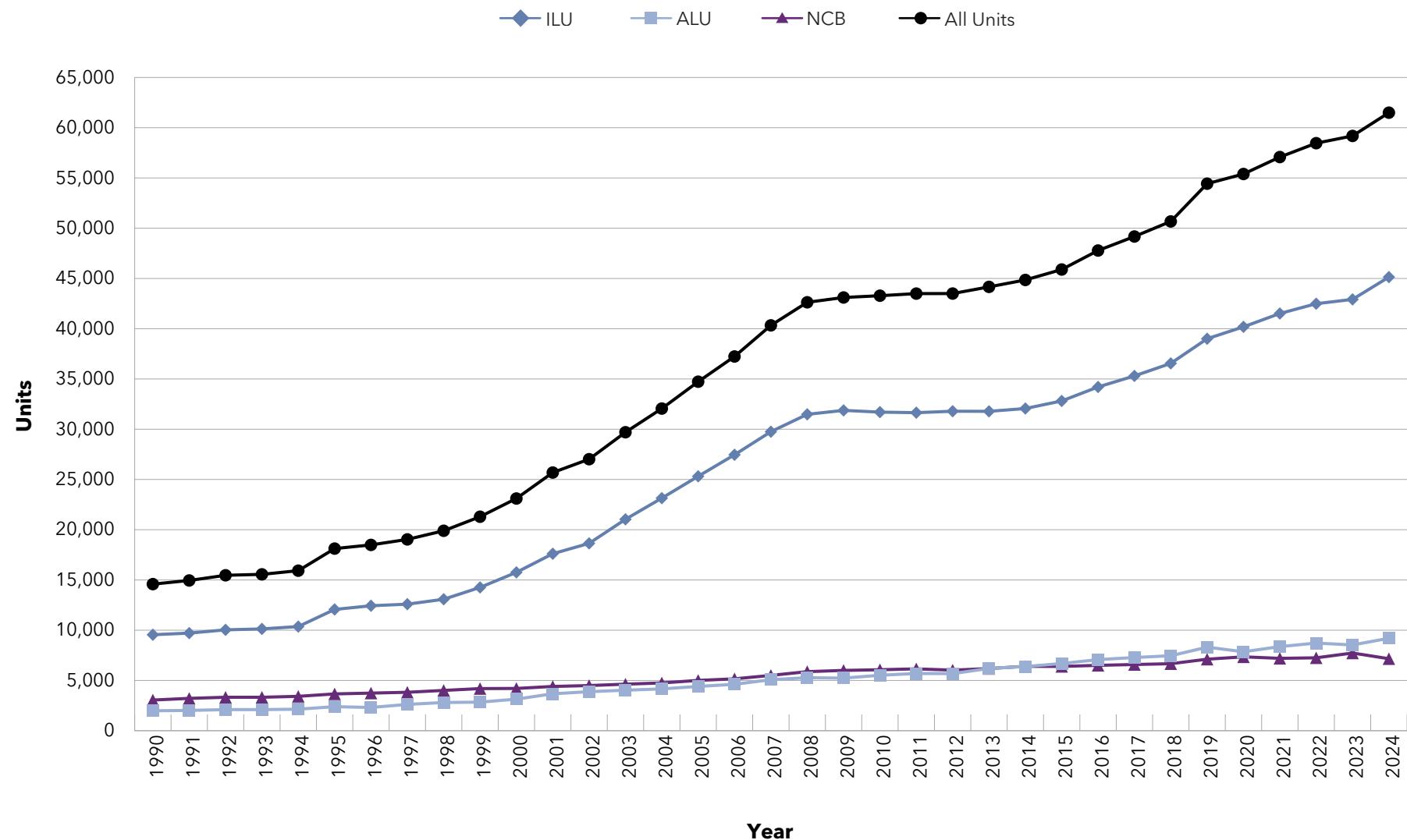
Growth: Growth of Largest 10 Systems



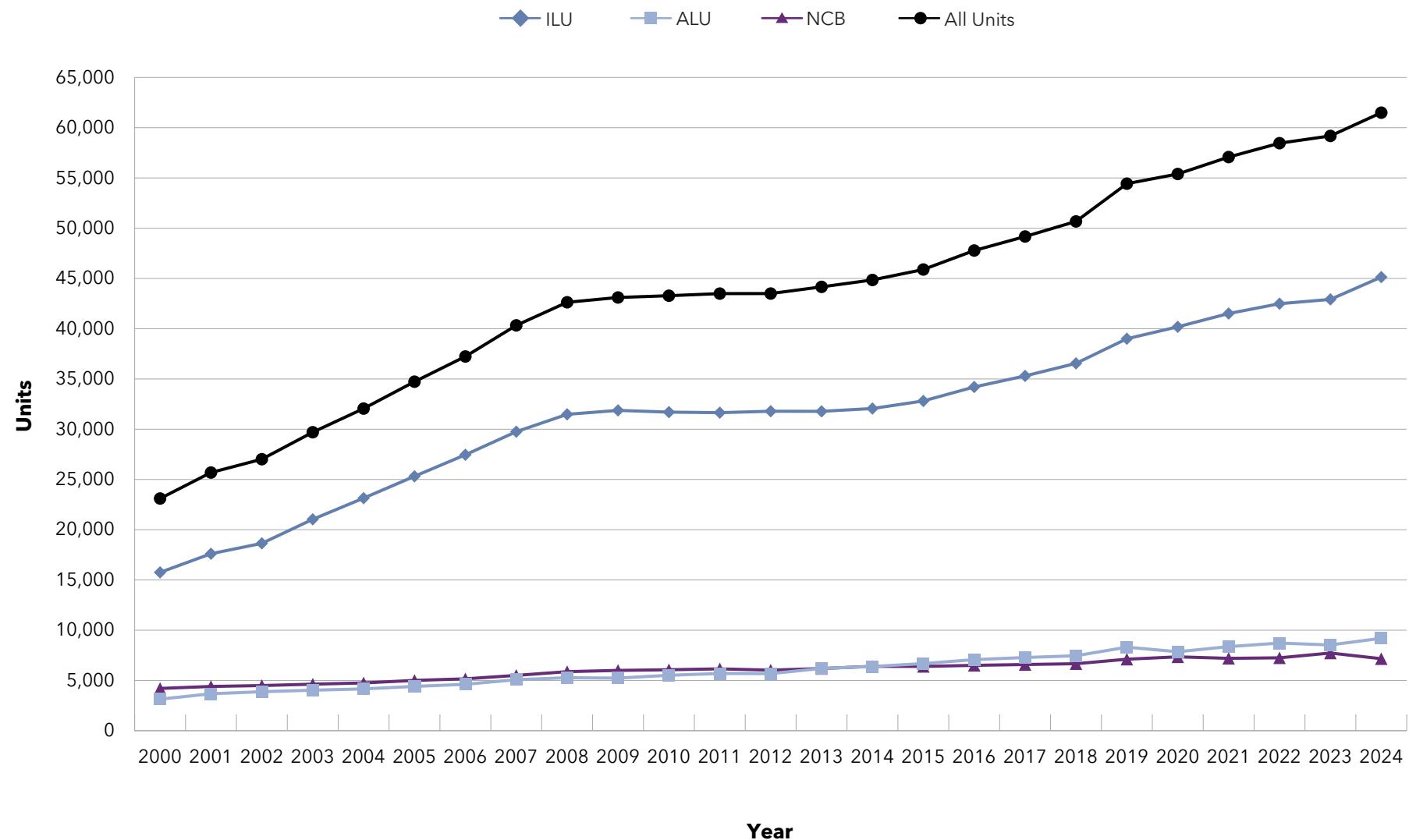
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1980
(Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



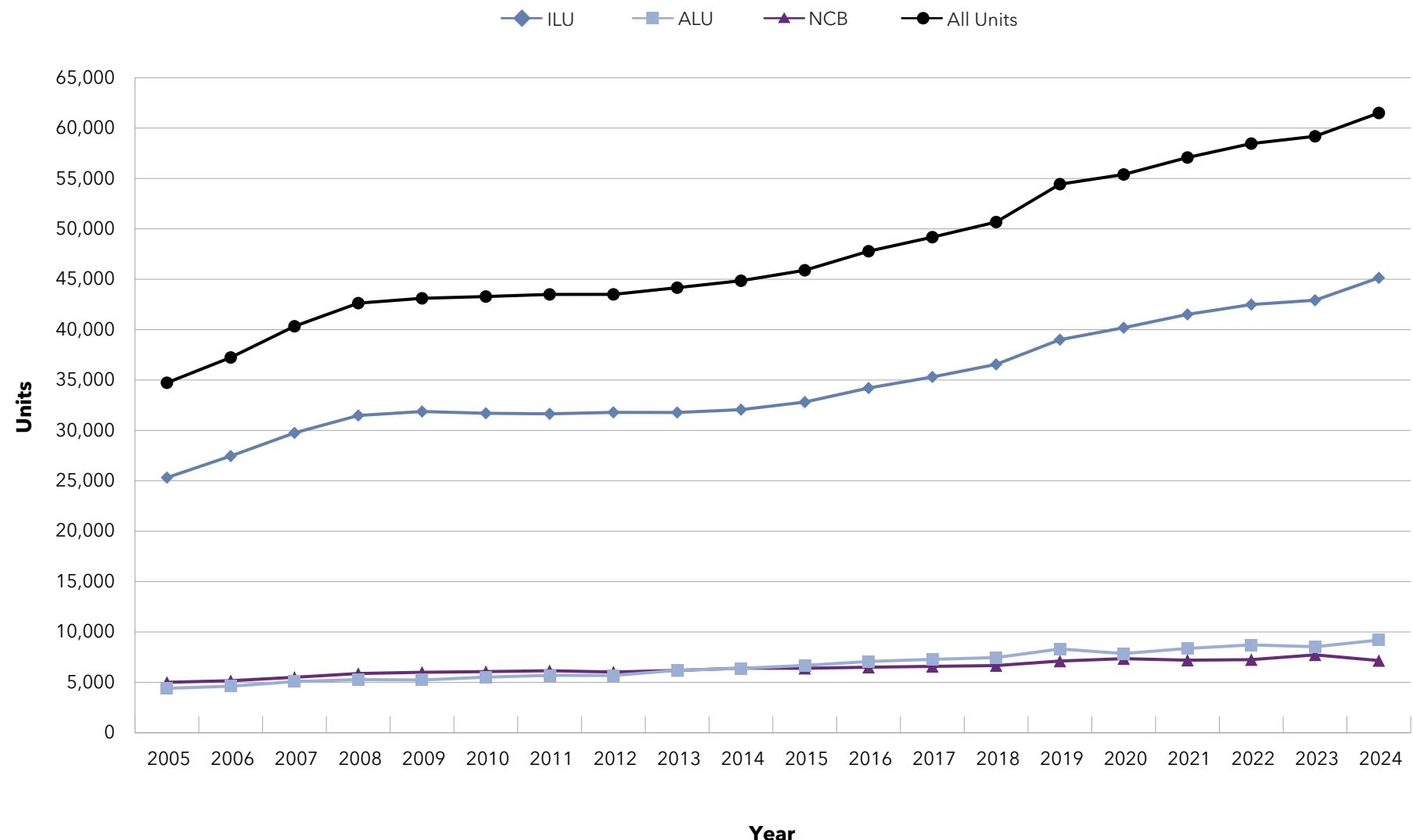
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1990
(Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



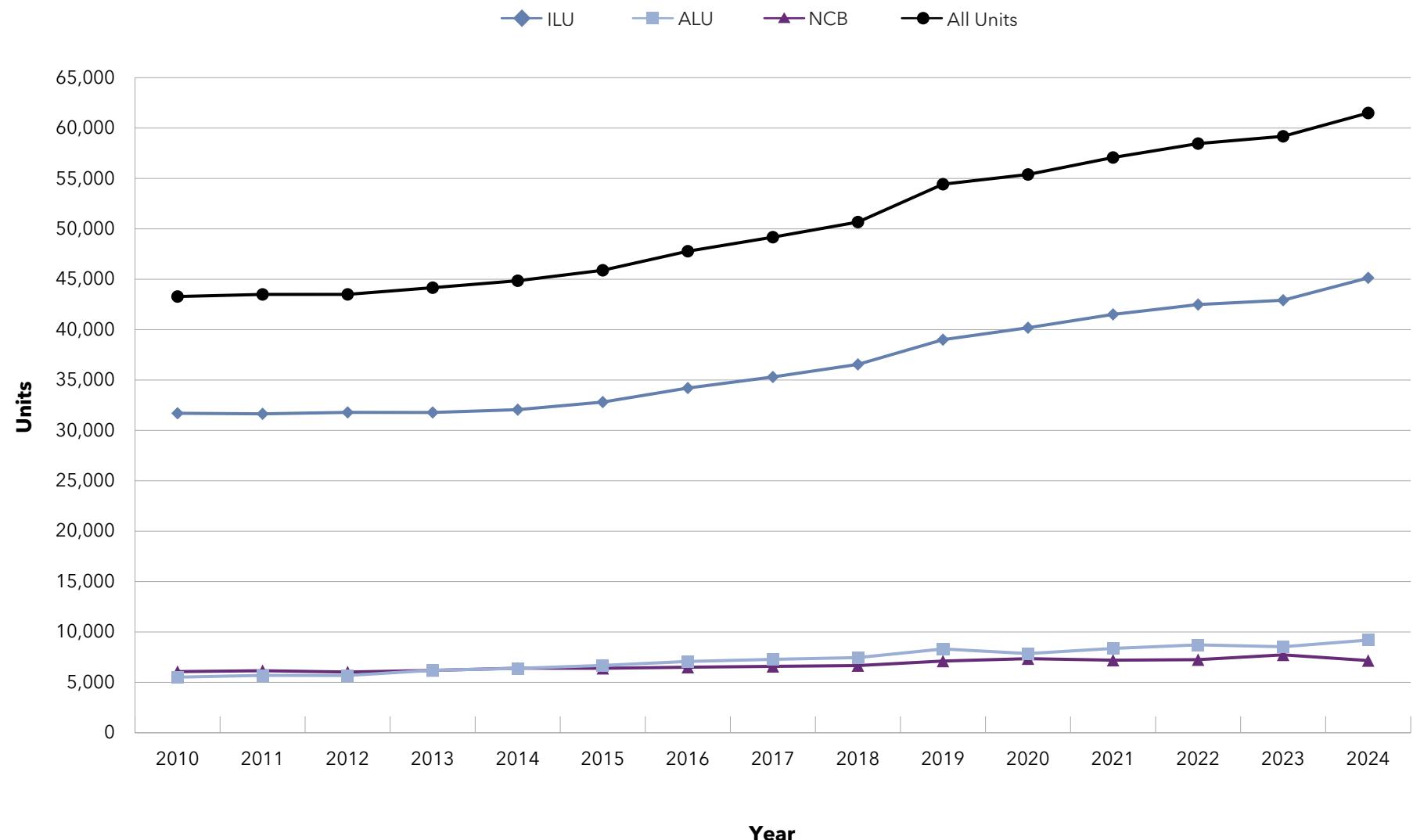
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2000
(Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



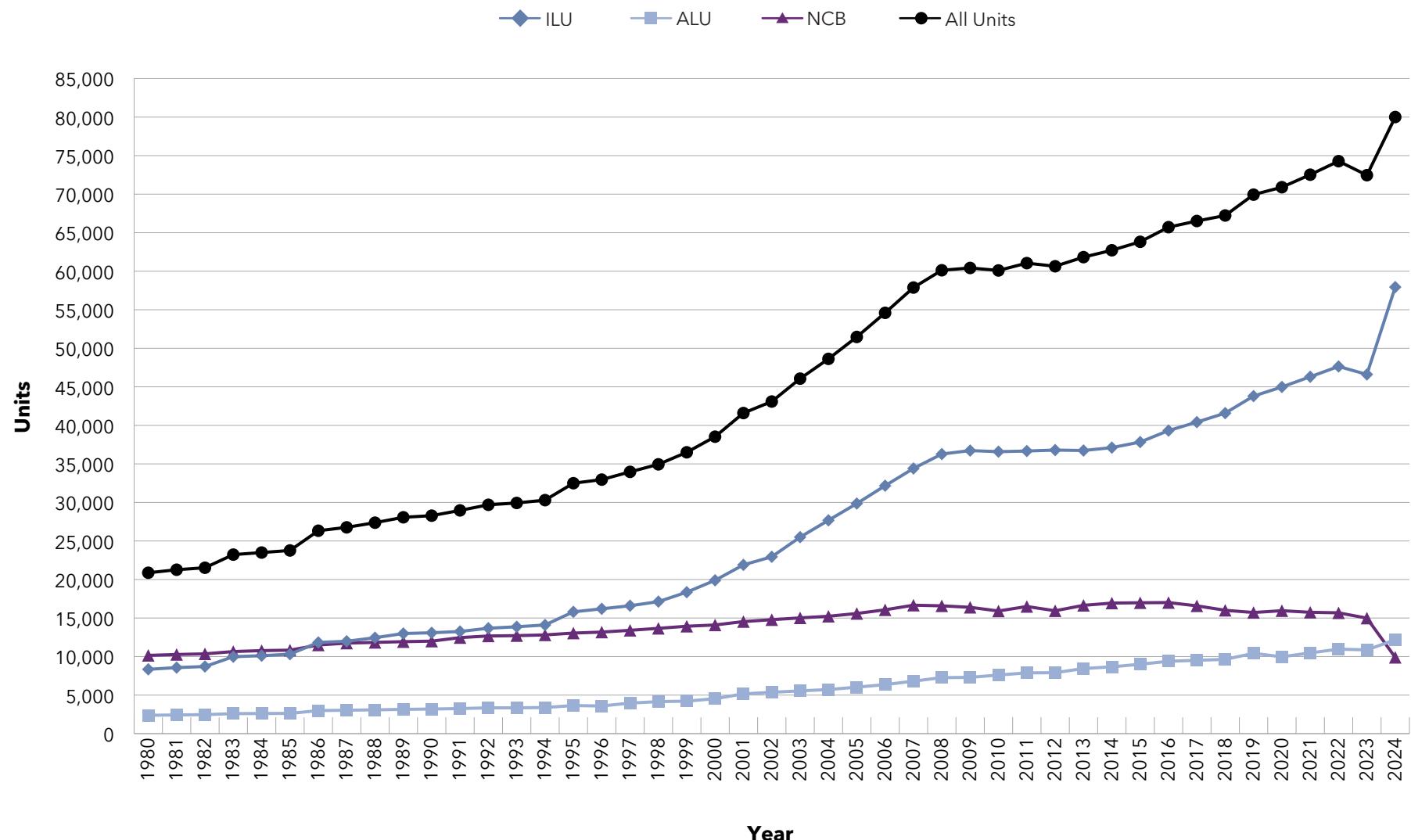
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005 (Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



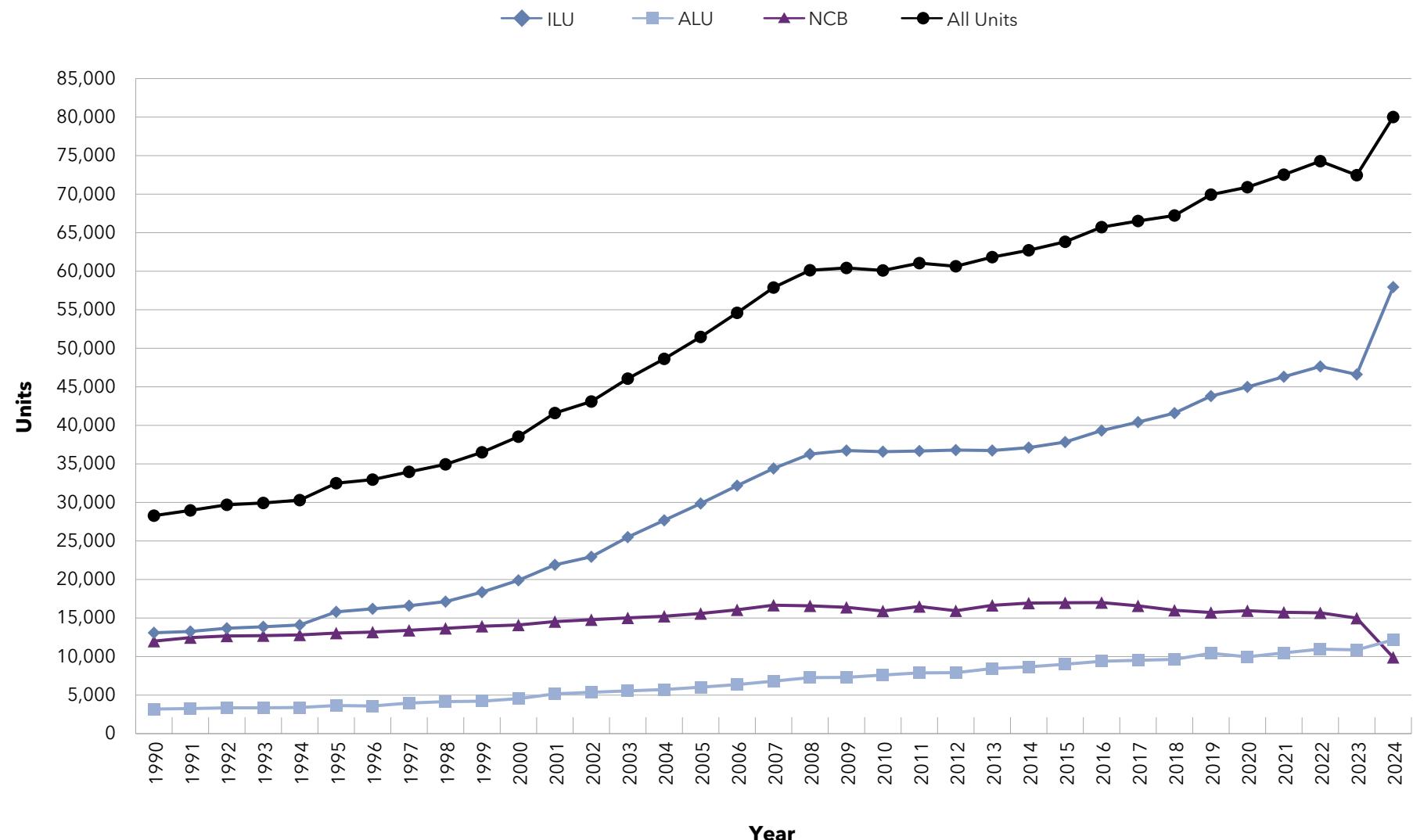
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2010
(Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



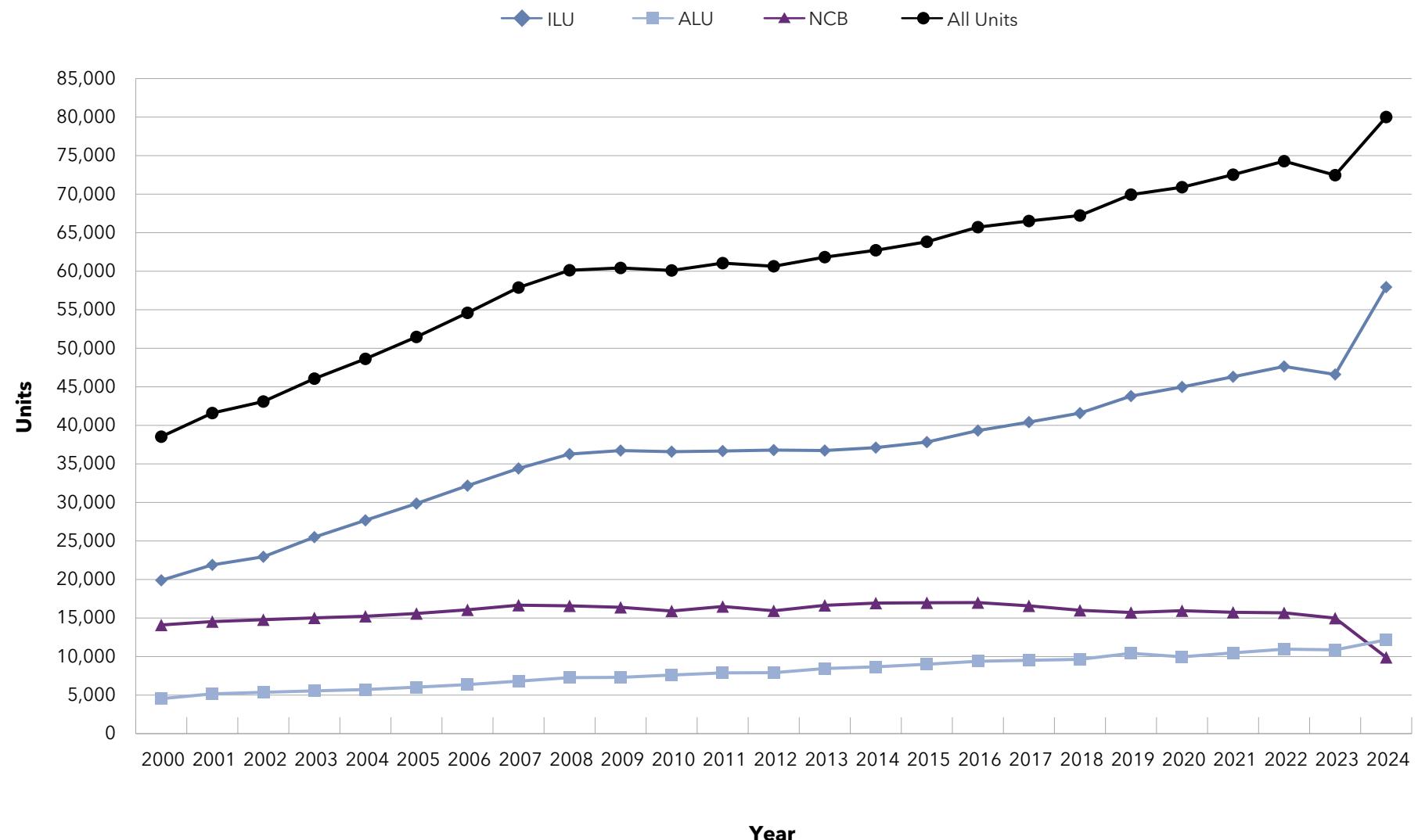
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1980
(Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



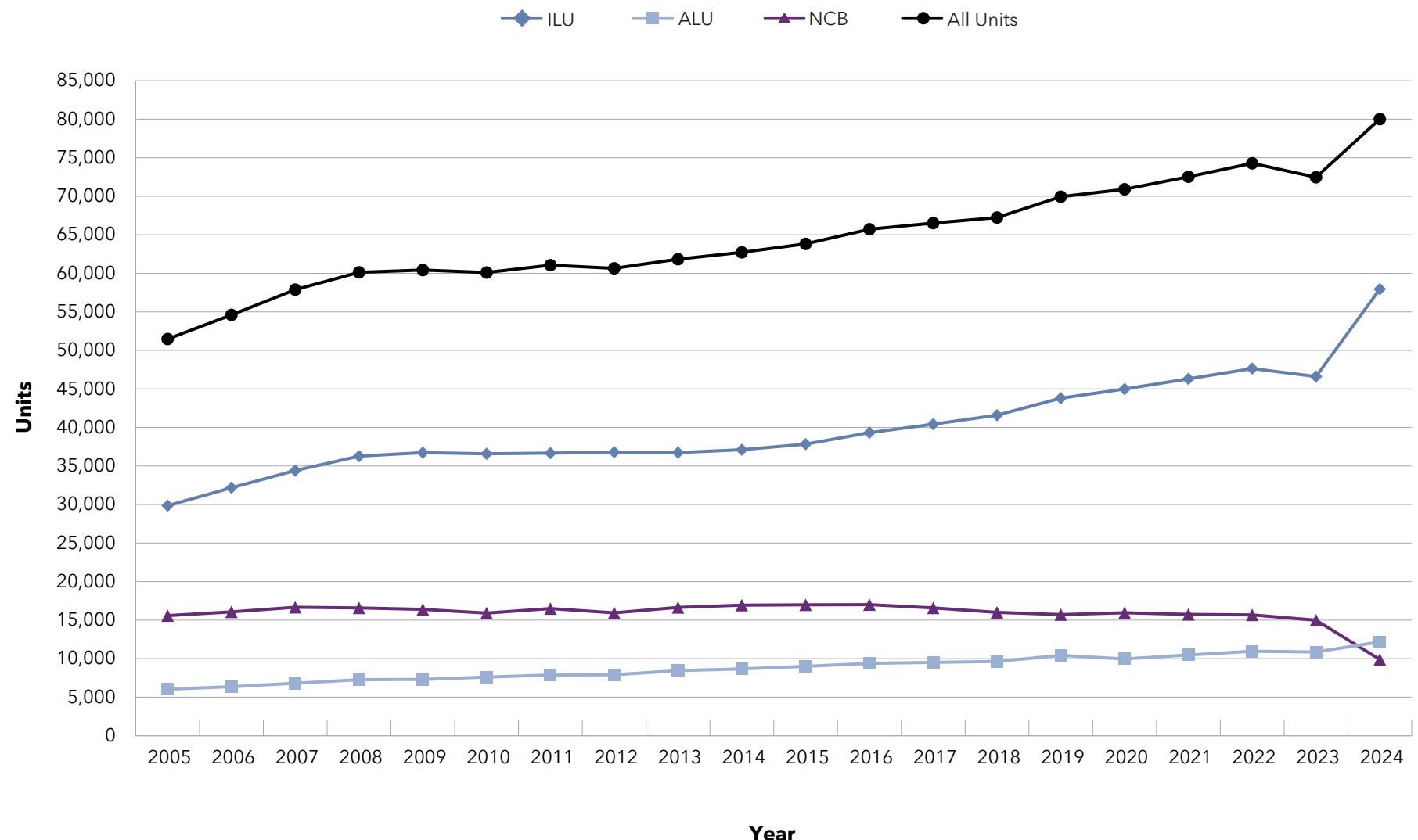
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1990
(Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2000 (Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005
(Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2010 (Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



Pace of Growth: The Largest 25 Systems

Pace of Growth charts (Charts 5-2a-t) trace the growth patterns of 19 of the 25 largest multi-sites in the LZ 200. Each significant point of growth in a multi-site's history is marked and explained on the chart. Six of the largest 25 organizations of the LZ 200 were excluded because of insufficient historical detail: The Evangelical Lutheran Good Samaritan Society (LZ 200 #2), Ascension Living (LZ 200 #5), Trinity Health Senior Communities (LZ 200 #9), Benedictine Health (LZ 200 #10), Ecumen (LZ 200 #22), and The Carmelite System (LZ 200 #23). The Pace of Growth charts show the different methods of change the systems are employing.

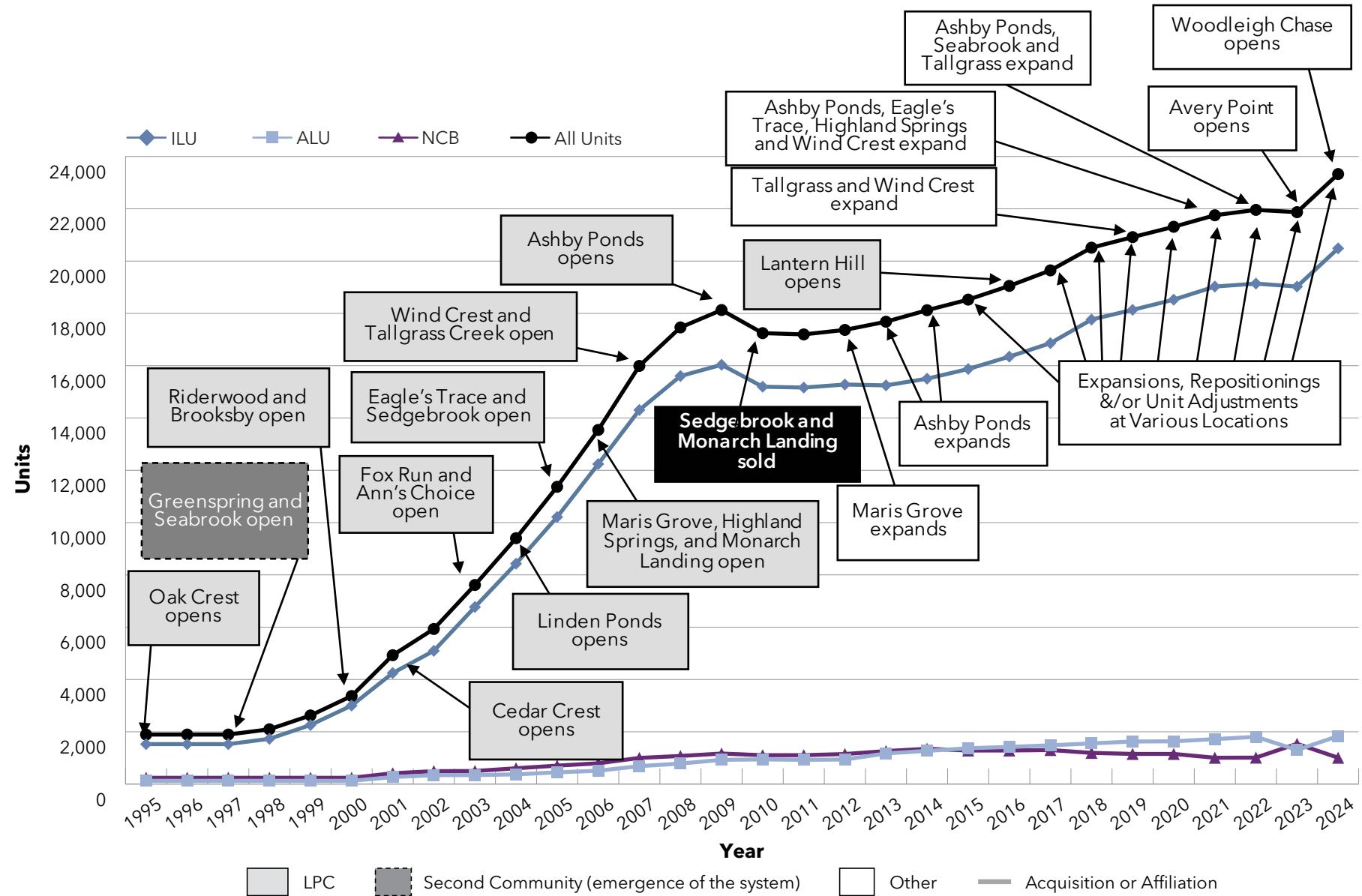
Significant new community construction and expansions are noted, with the addition of the second community highlighted in a dashed box. Affiliations, acquisitions and mergers (gray-framed box) and dispositions (bold black box) are also highlighted.

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



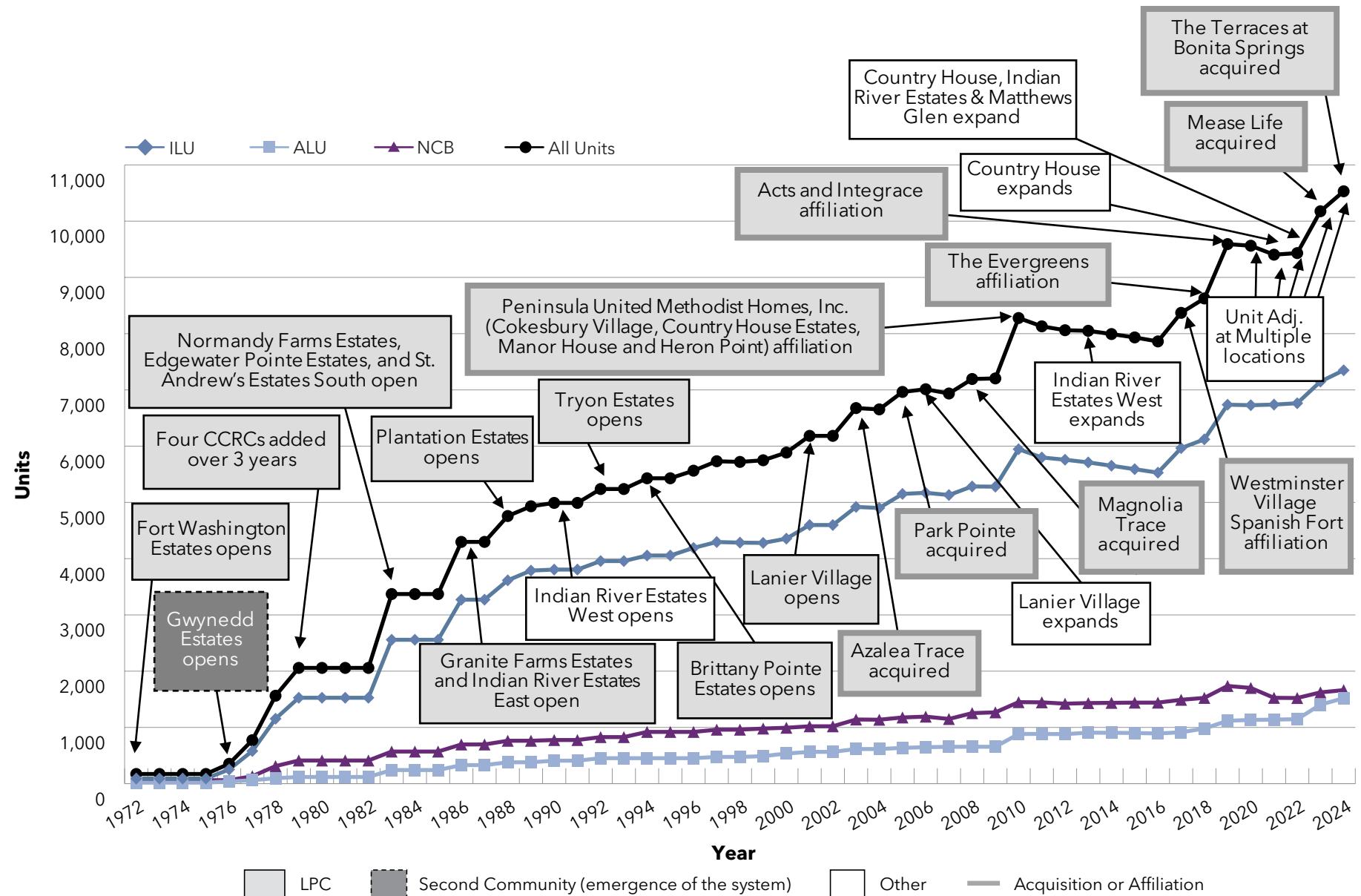
Growth: Pace of Growth

National Senior Communities (DC) Text boxes point to opening date of first phase of communities



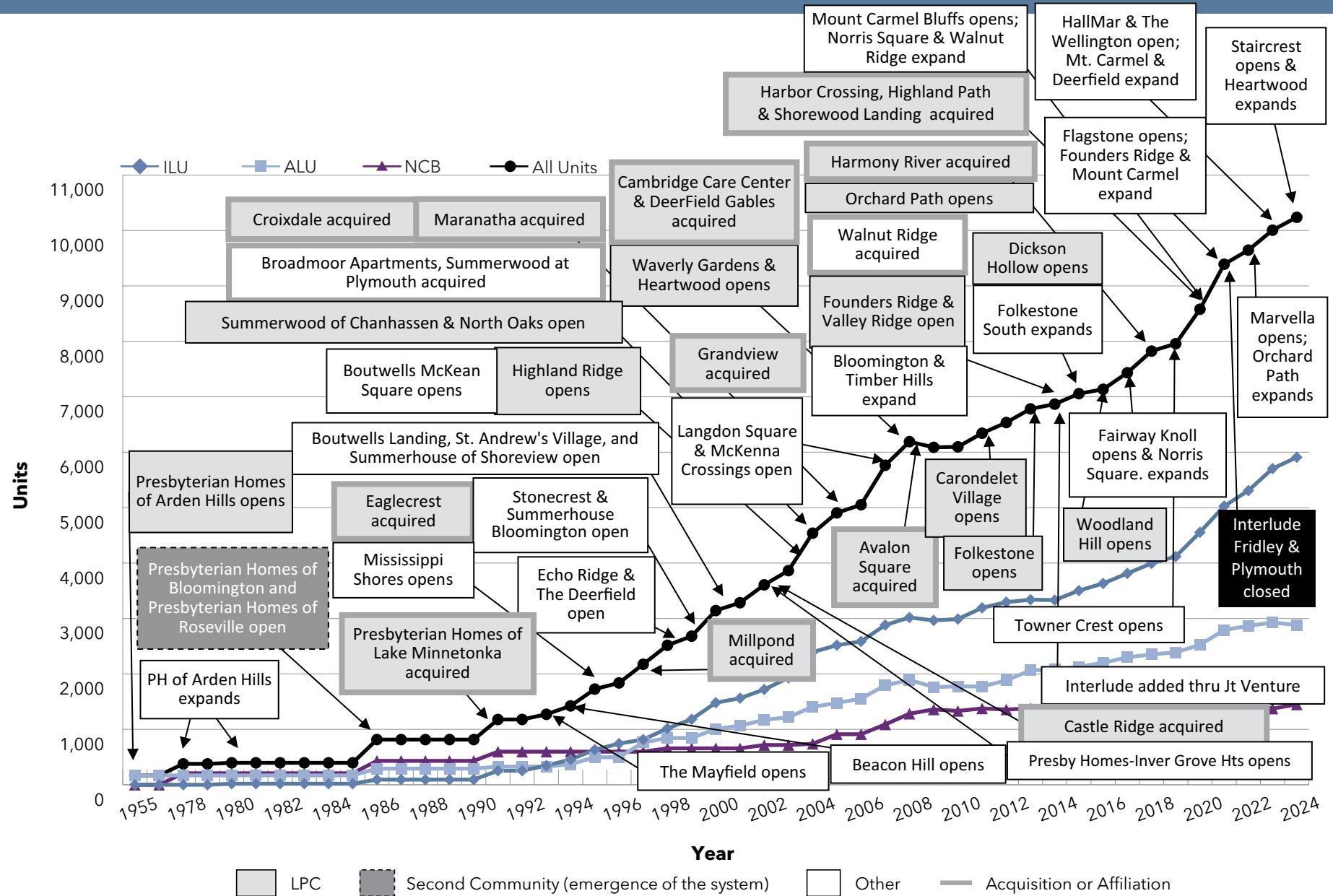
Growth: Pace of Growth

Acts Retirement-Life Communities (PA)



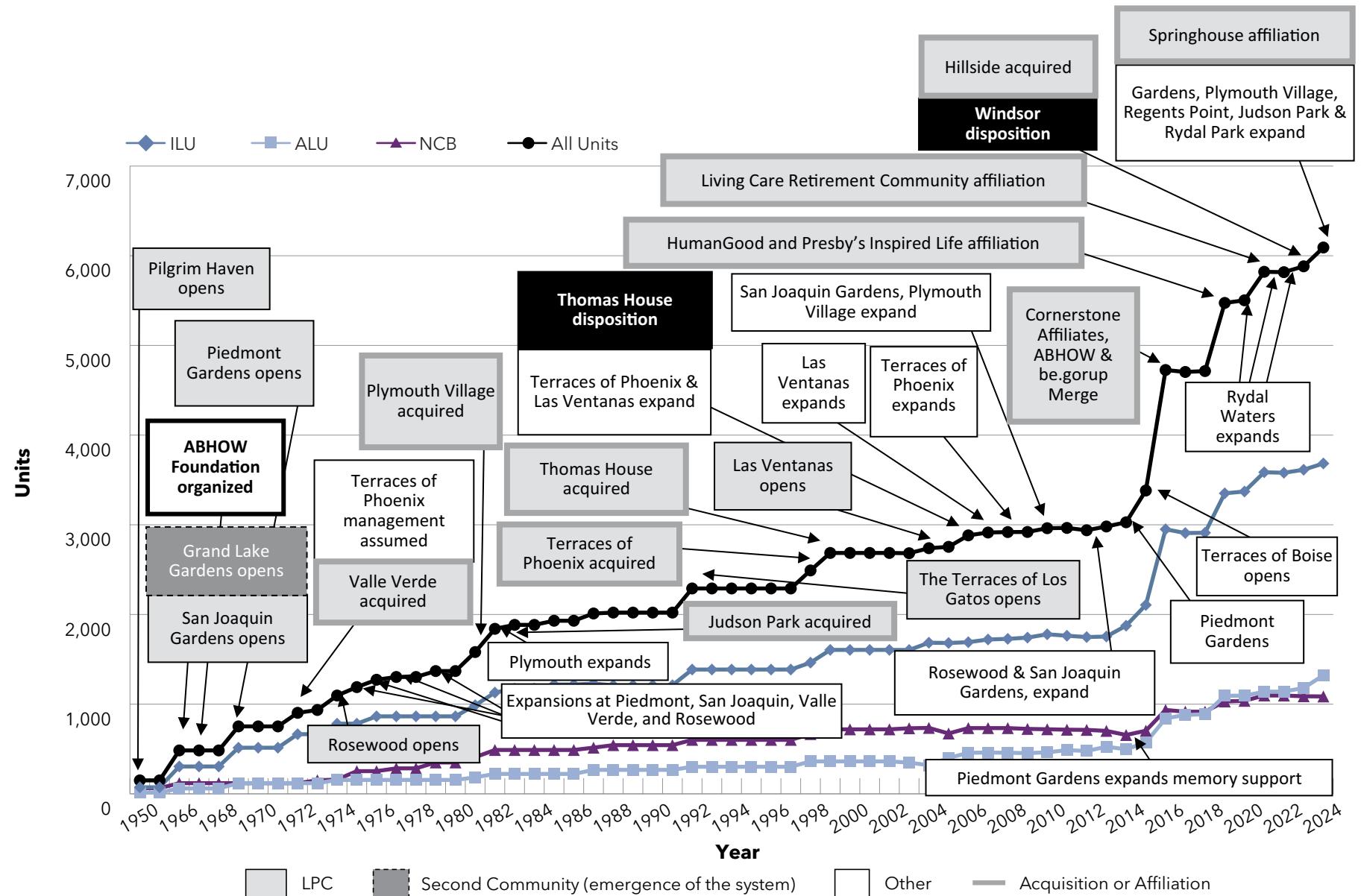
Growth: Pace of Growth

Presbyterian Homes and Services (MN)



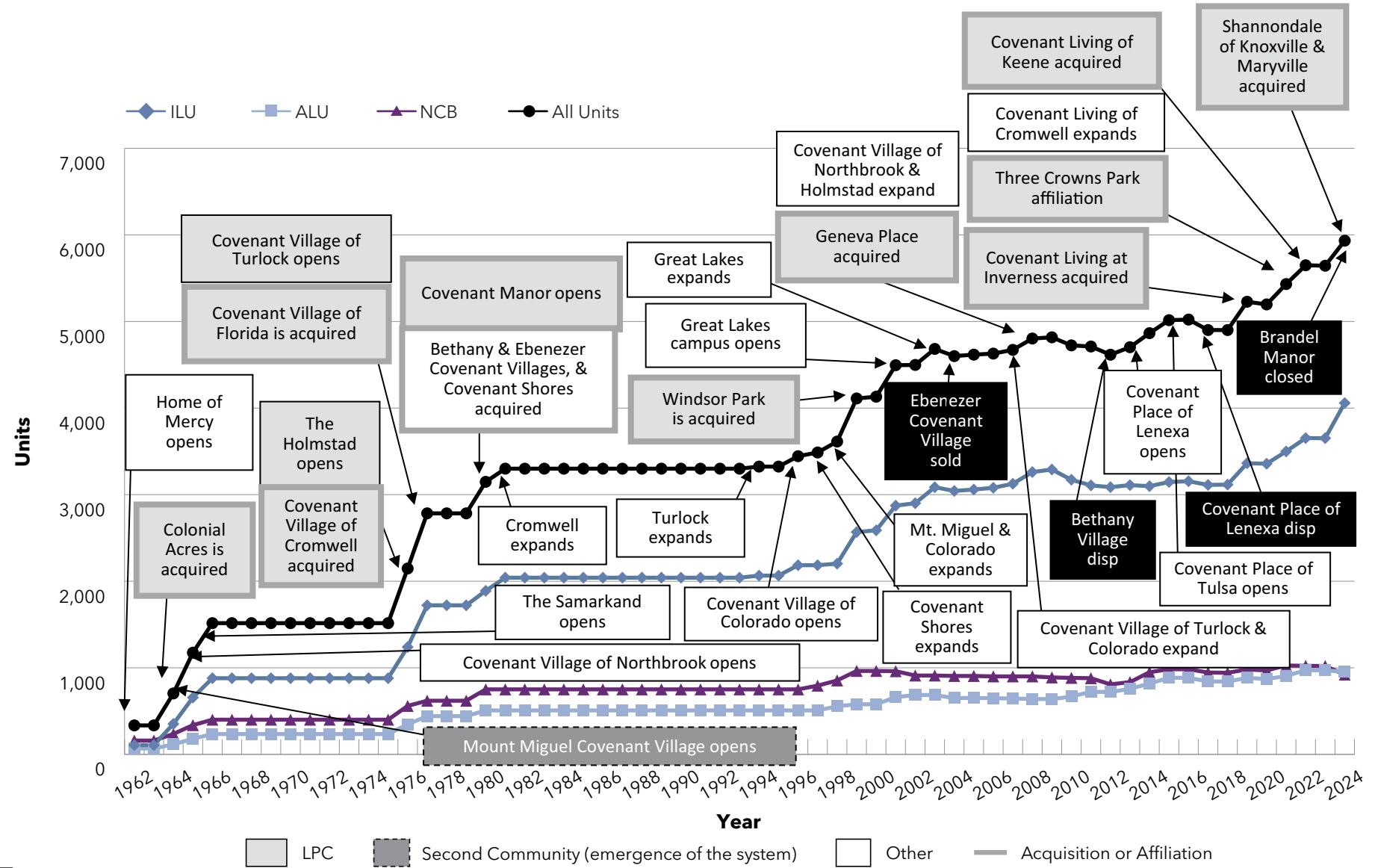
Growth: Pace of Growth

HumanGood (CA)



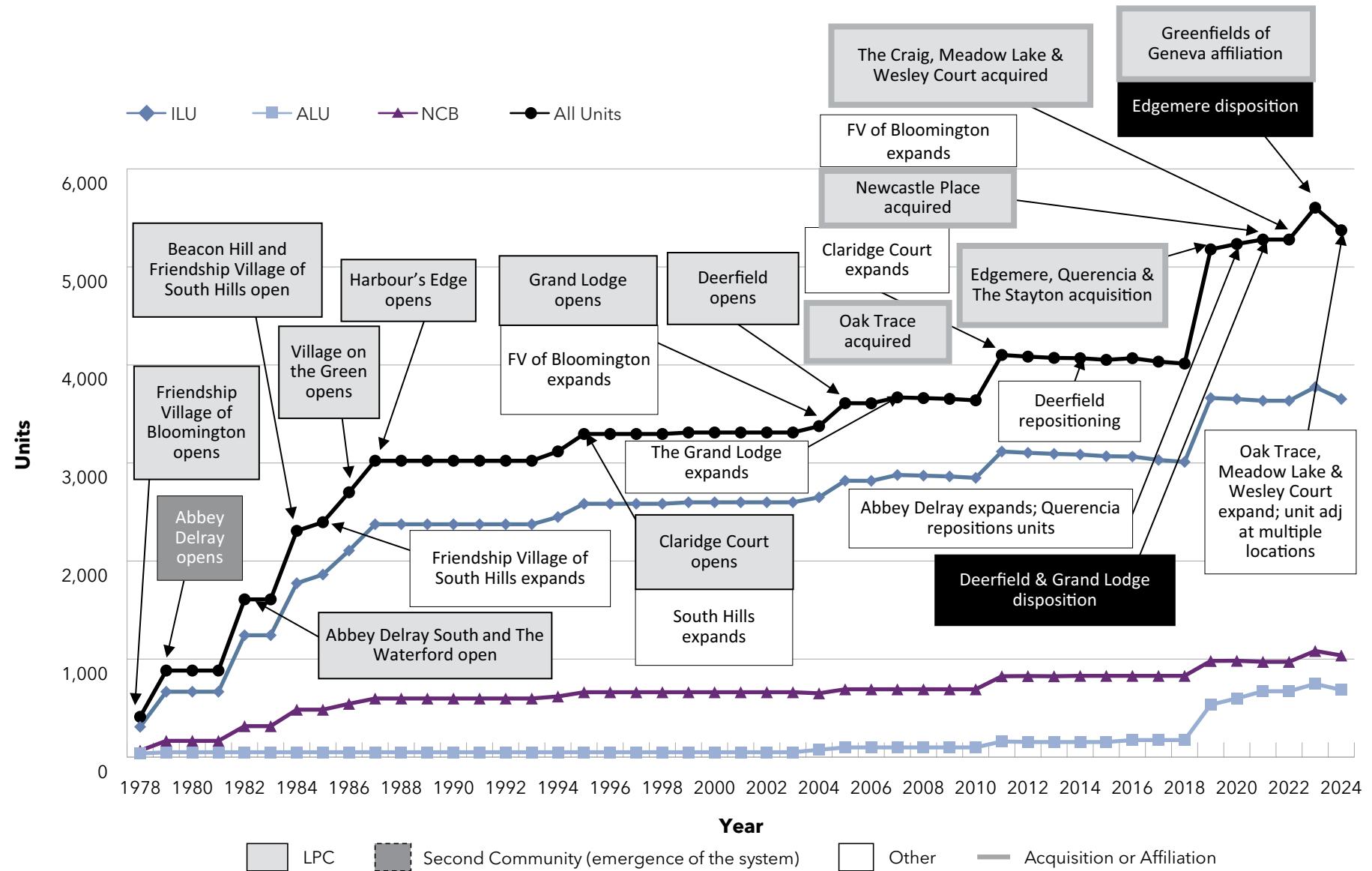
Growth: Pace of Growth

Covenant Living Communities & Services (IL)



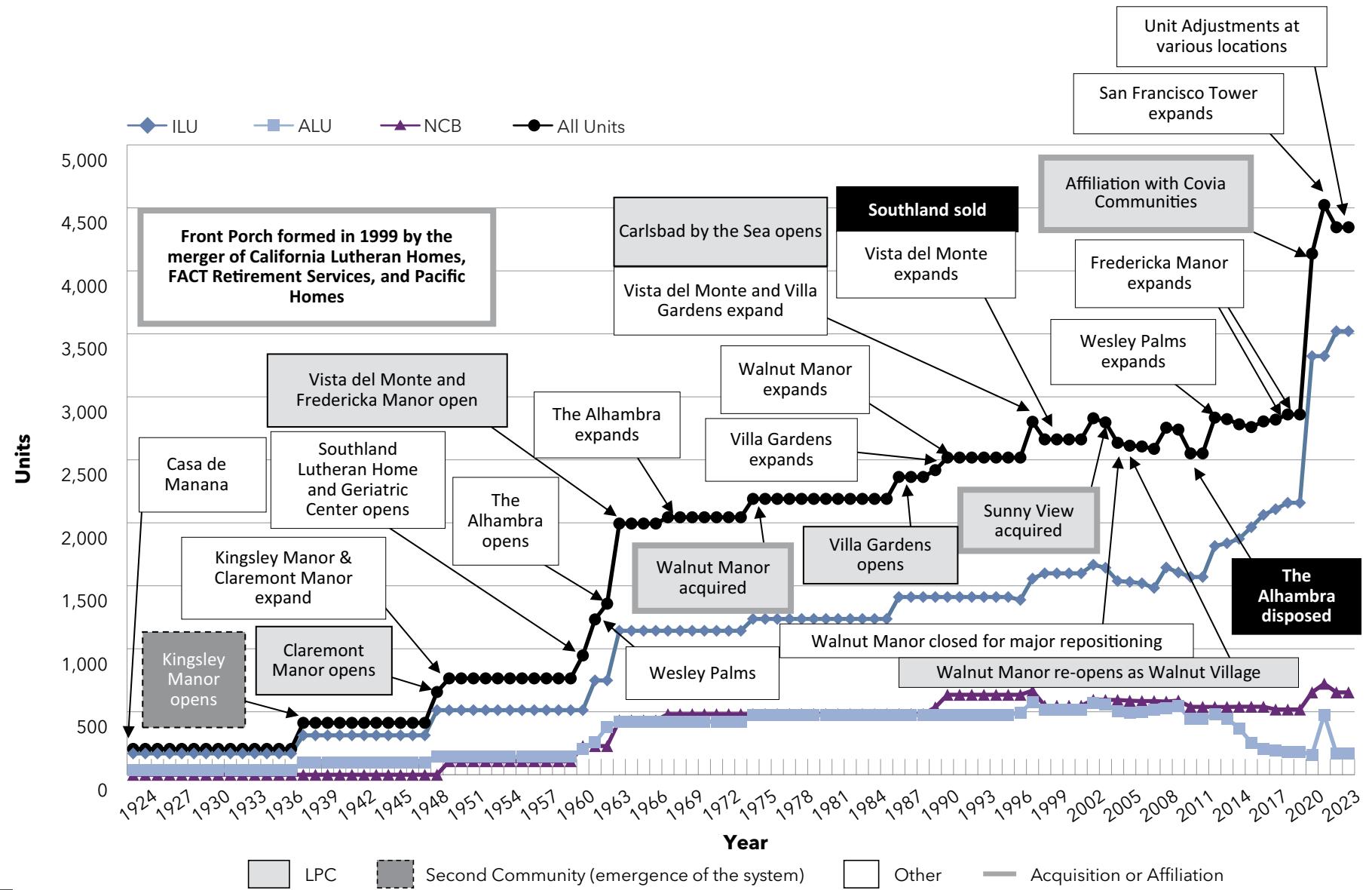
Growth: Pace of Growth

Lifespace Communities, Inc. (IA)



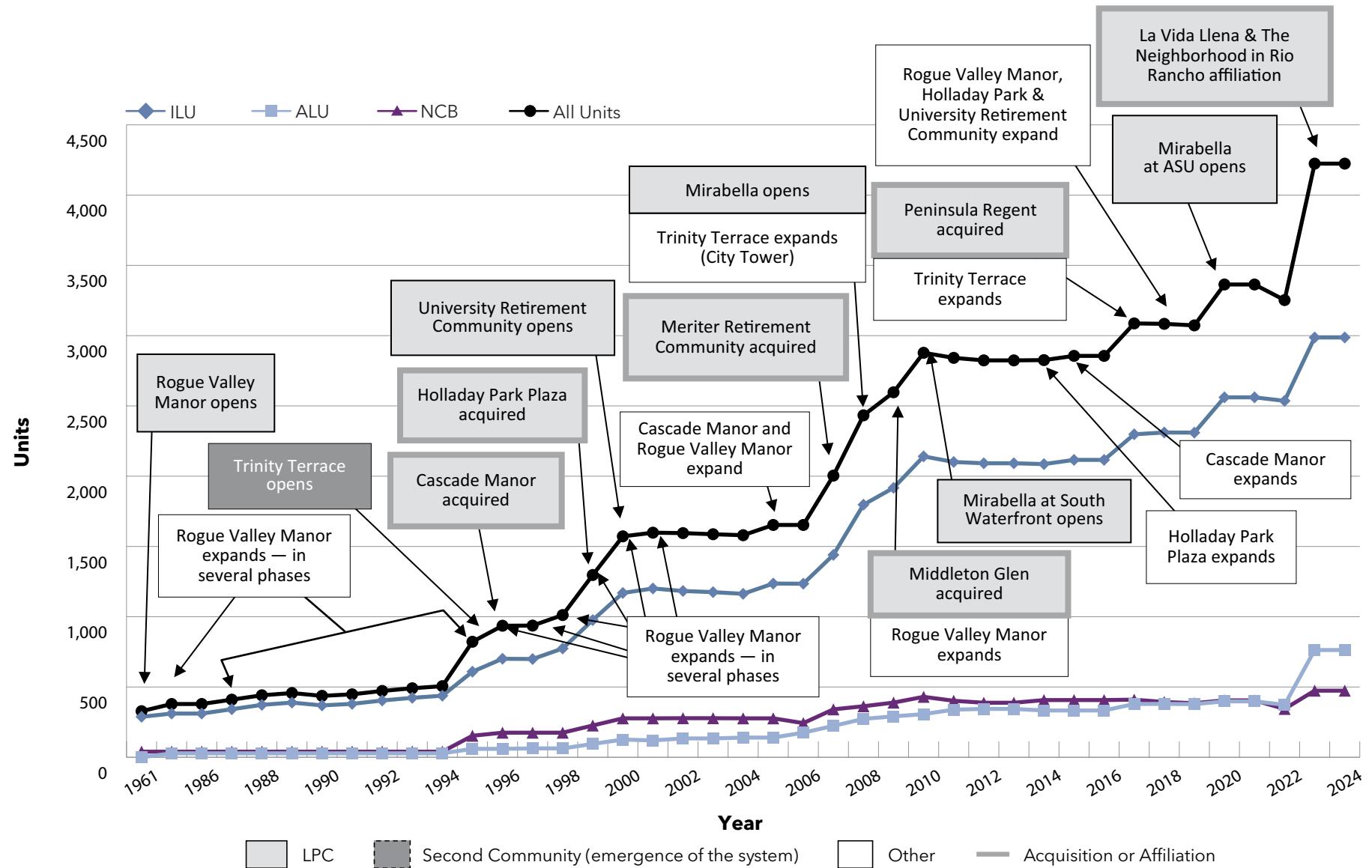
Growth: Pace of Growth

Front Porch Communities and Services (CA)



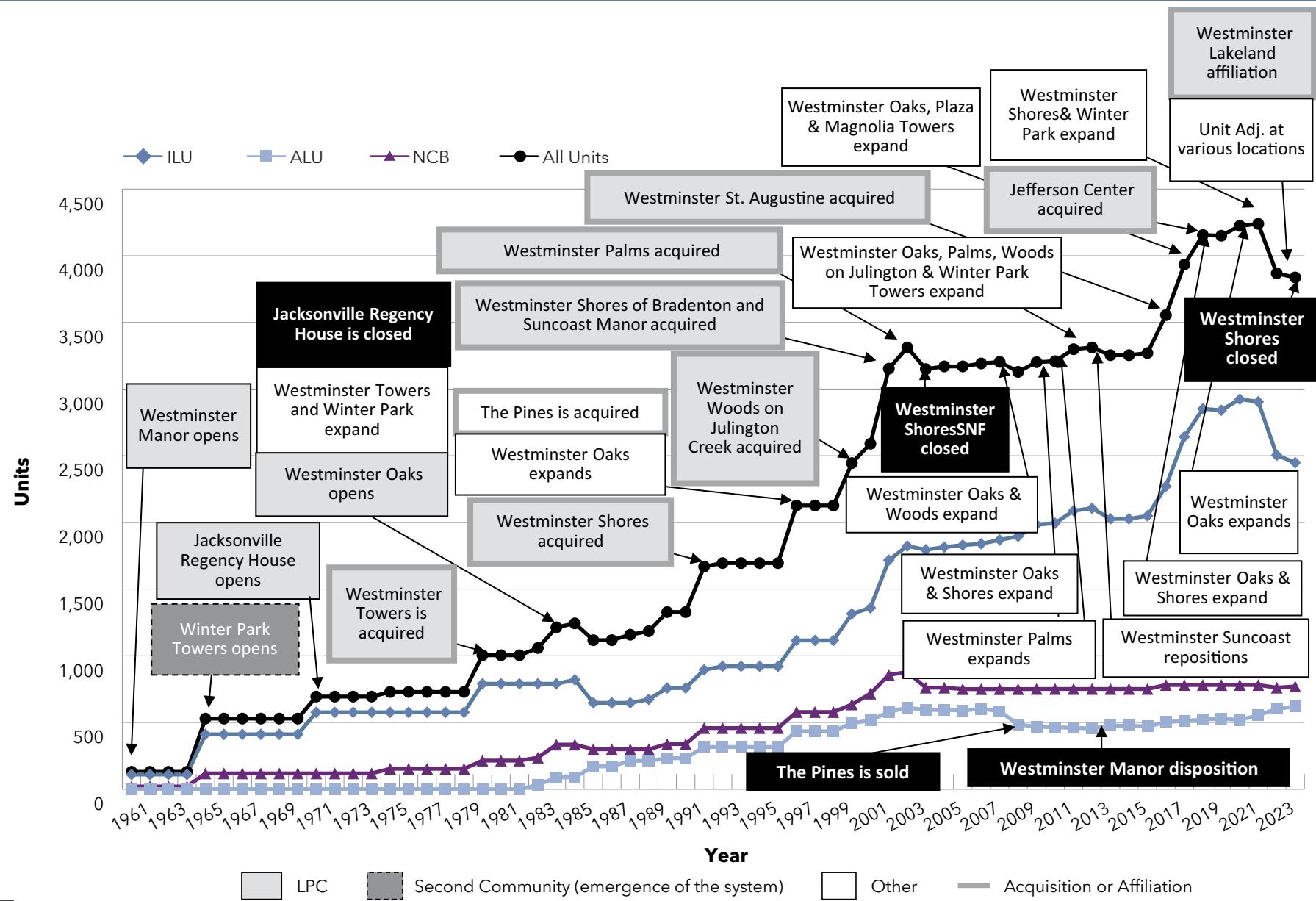
Growth: Pace of Growth

Pacific Retirement Services (OR)



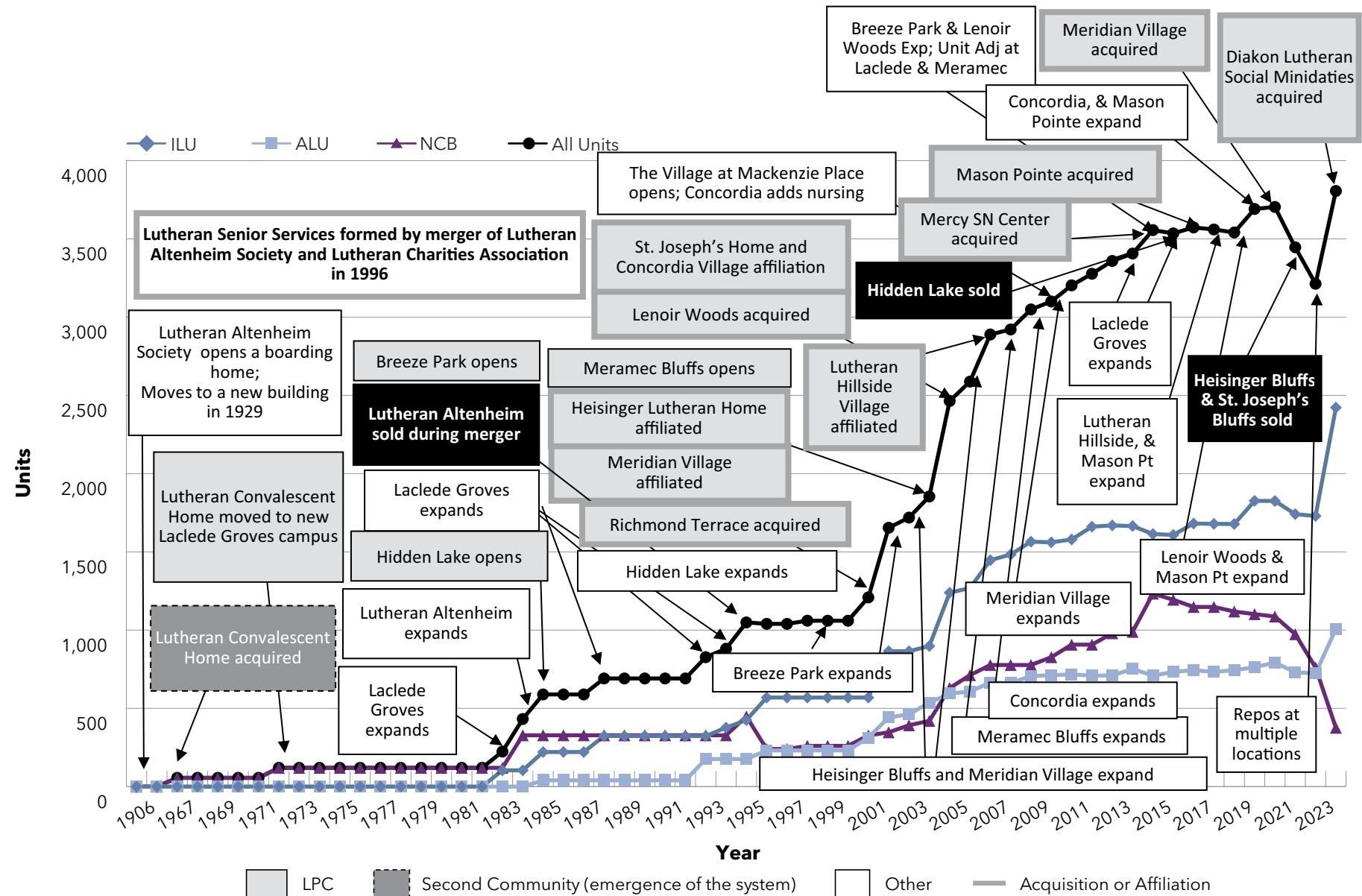
Growth: Pace of Growth

Westminster Communities of Florida (FL)



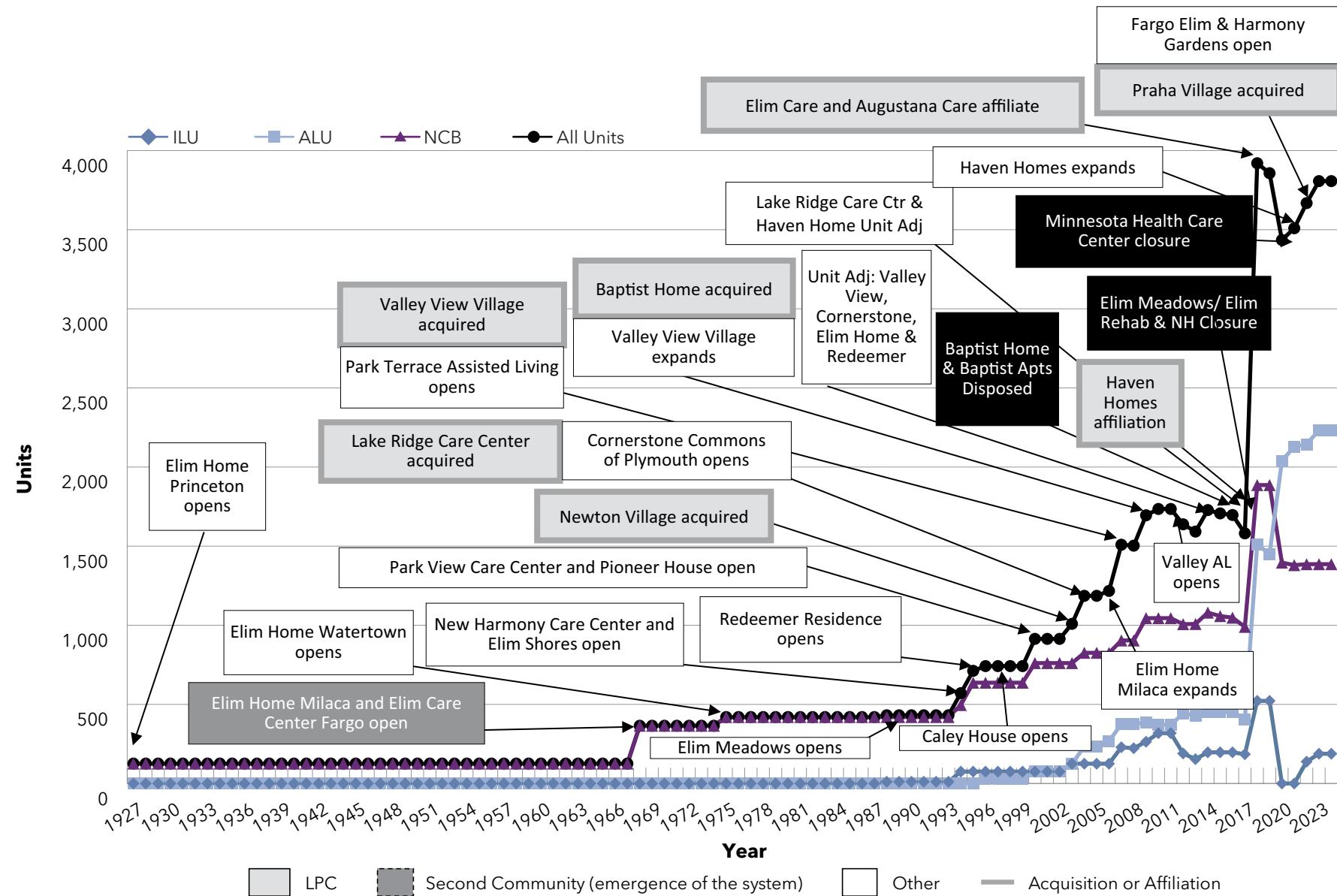
Growth: Pace of Growth

EverTrue fka Lutheran Senior Services (MO)



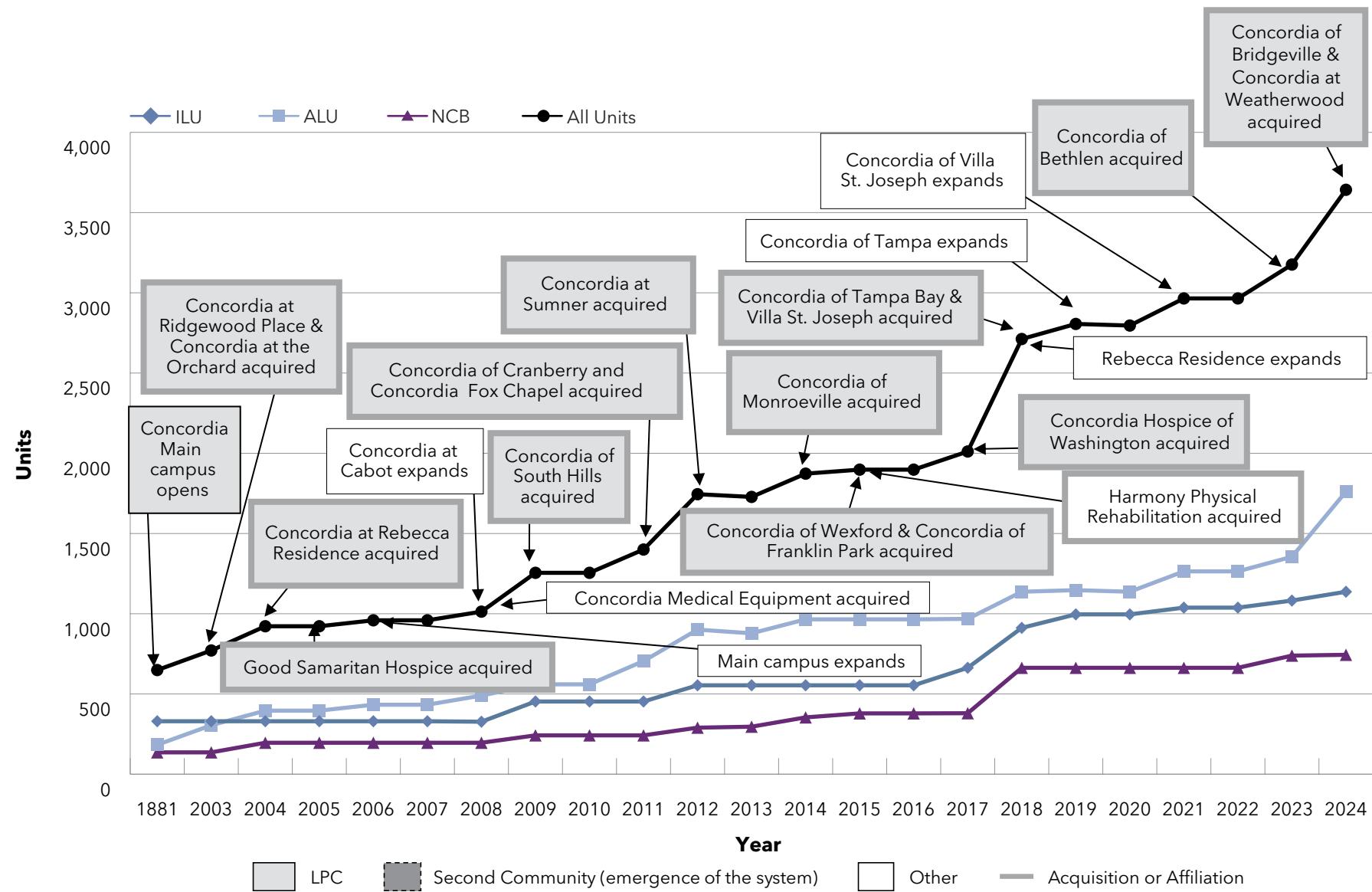
Growth: Pace of Growth

Cassia (MN)



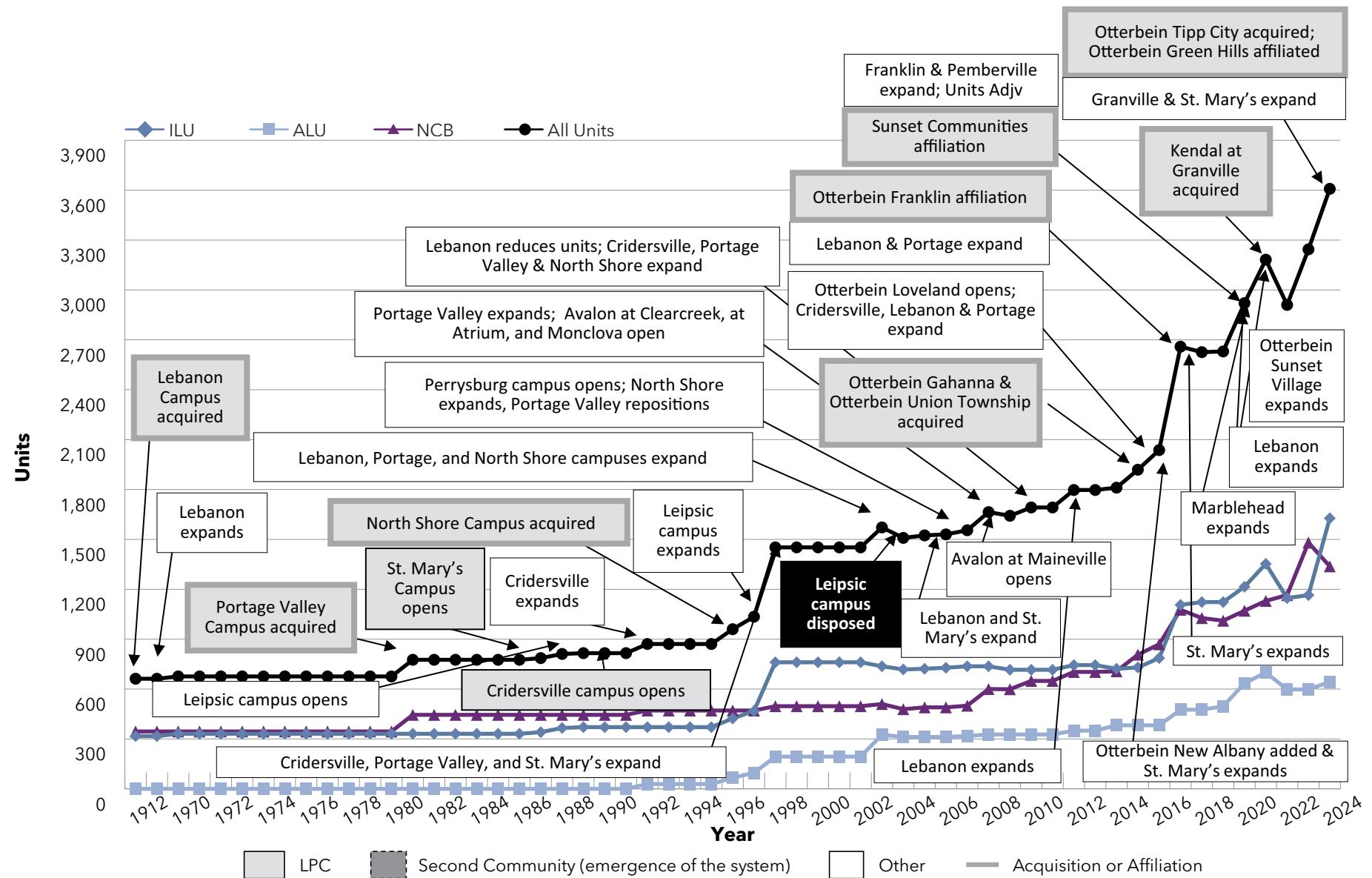
Growth: Pace of Growth

Concordia Lutheran Ministries (PA)



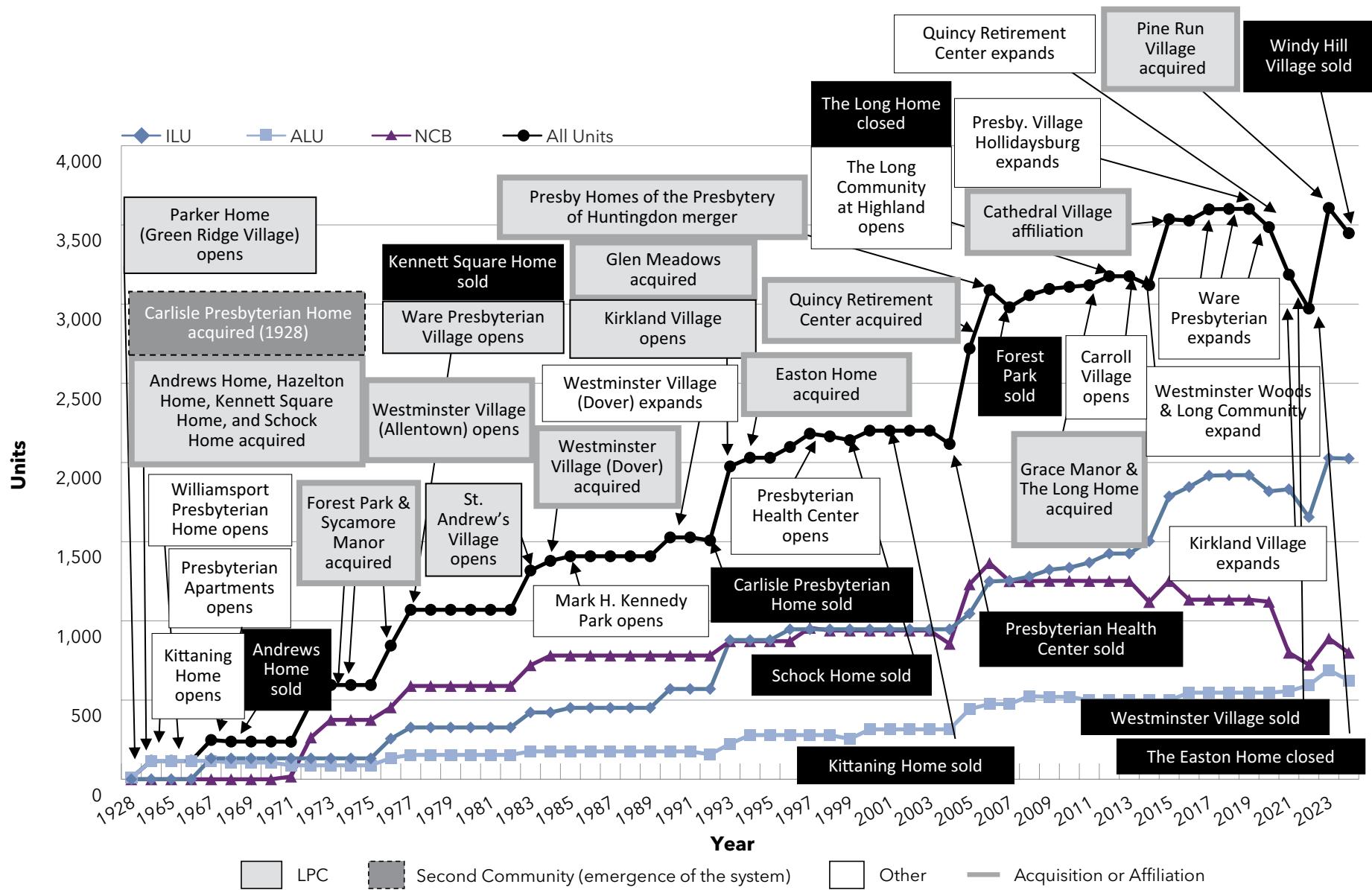
Growth: Pace of Growth

Otterbein SeniorLife (OH)



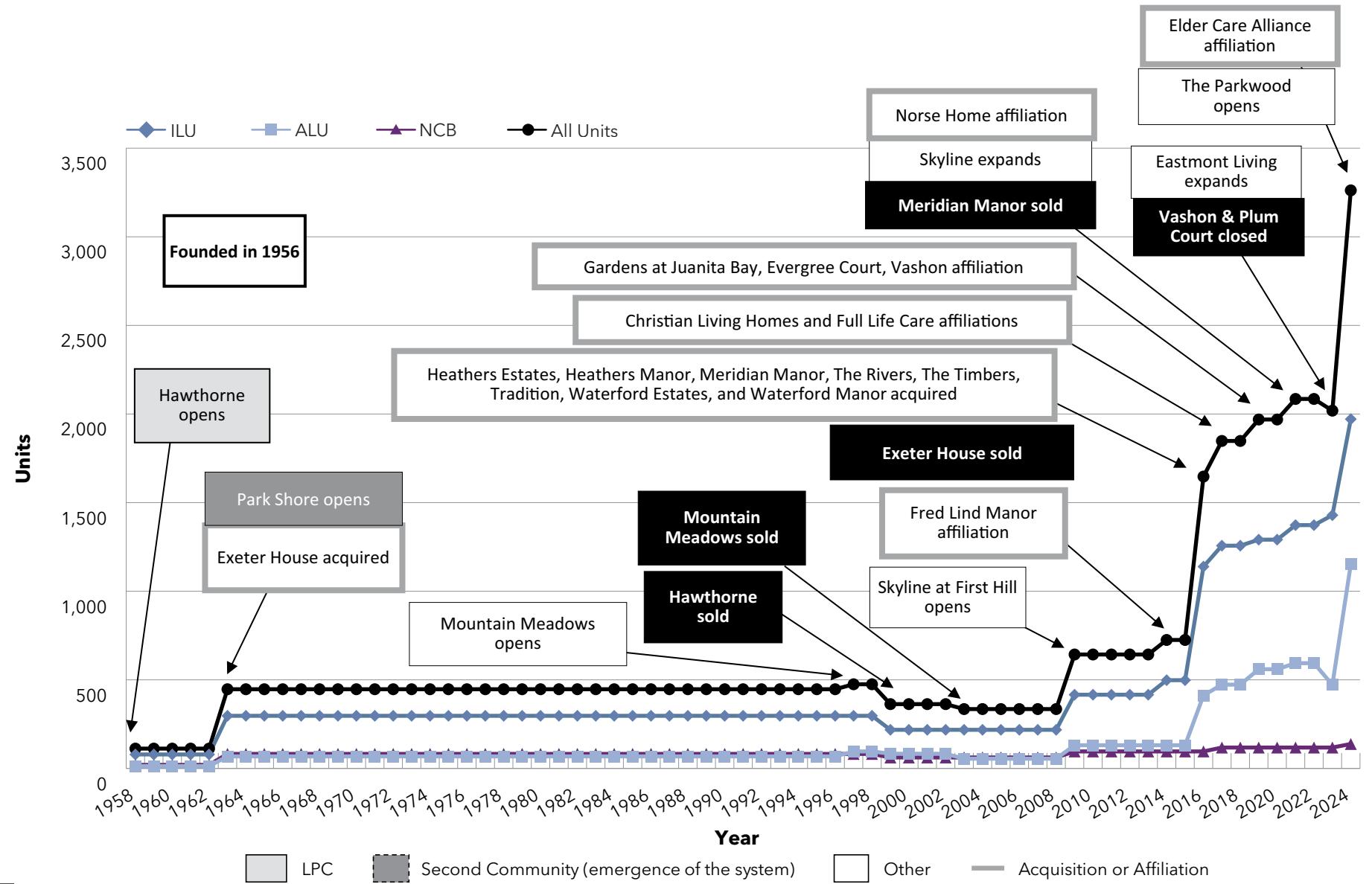
Growth: Pace of Growth

Presbyterian Senior Living (PA)



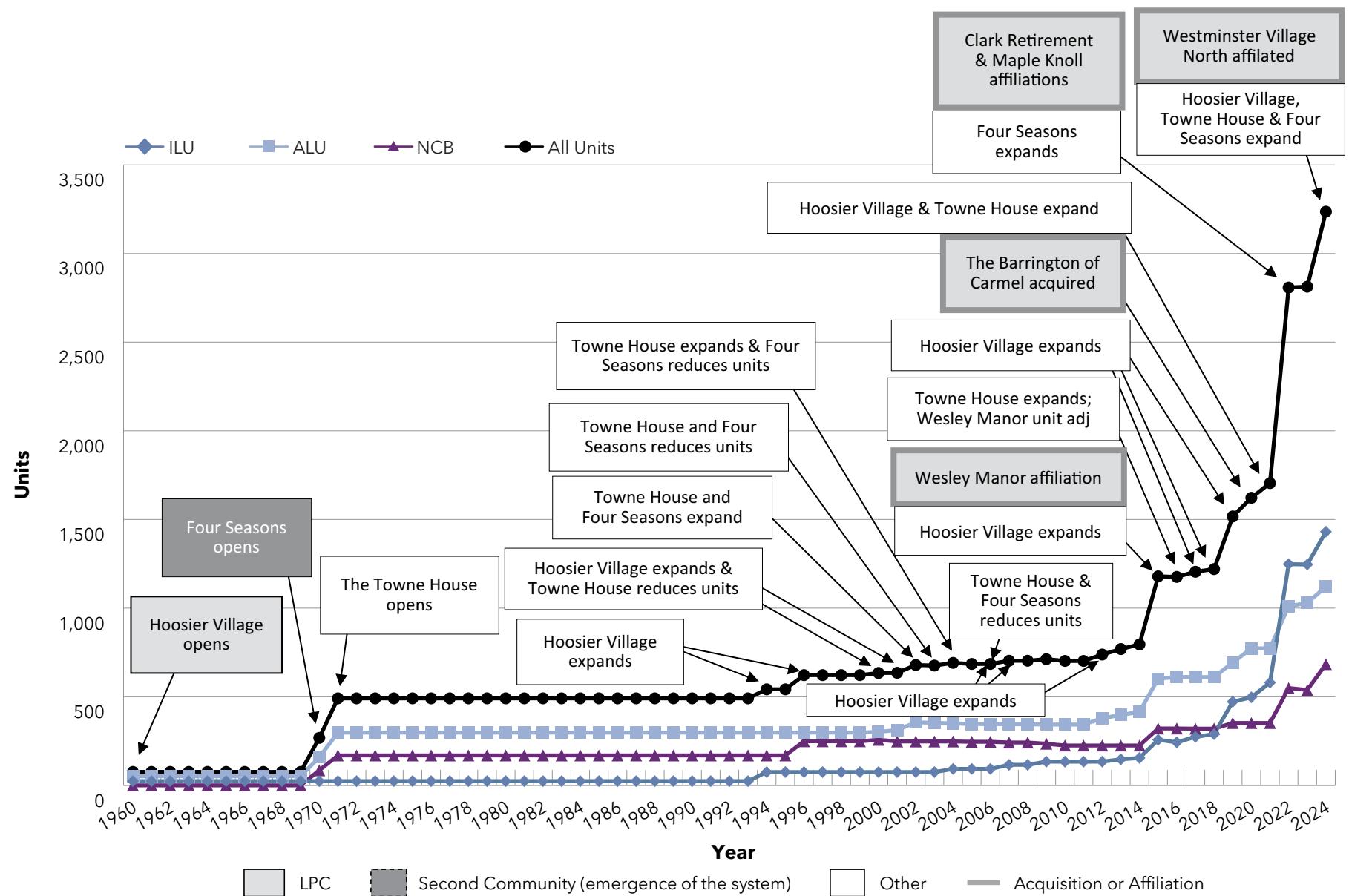
Growth: Pace of Growth

Transforming Age (WA)

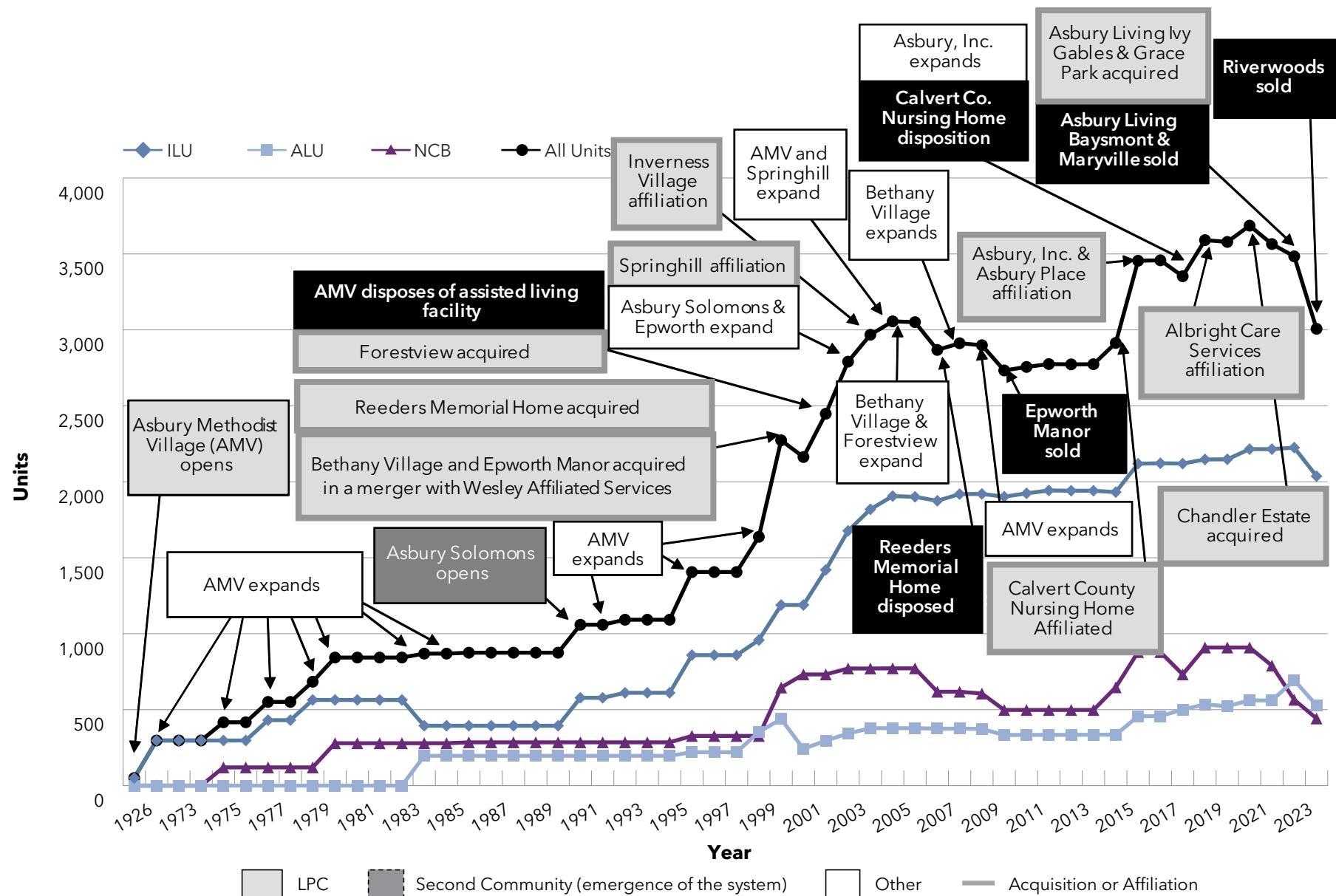


Growth: Pace of Growth

BHI Senior Living (IN)

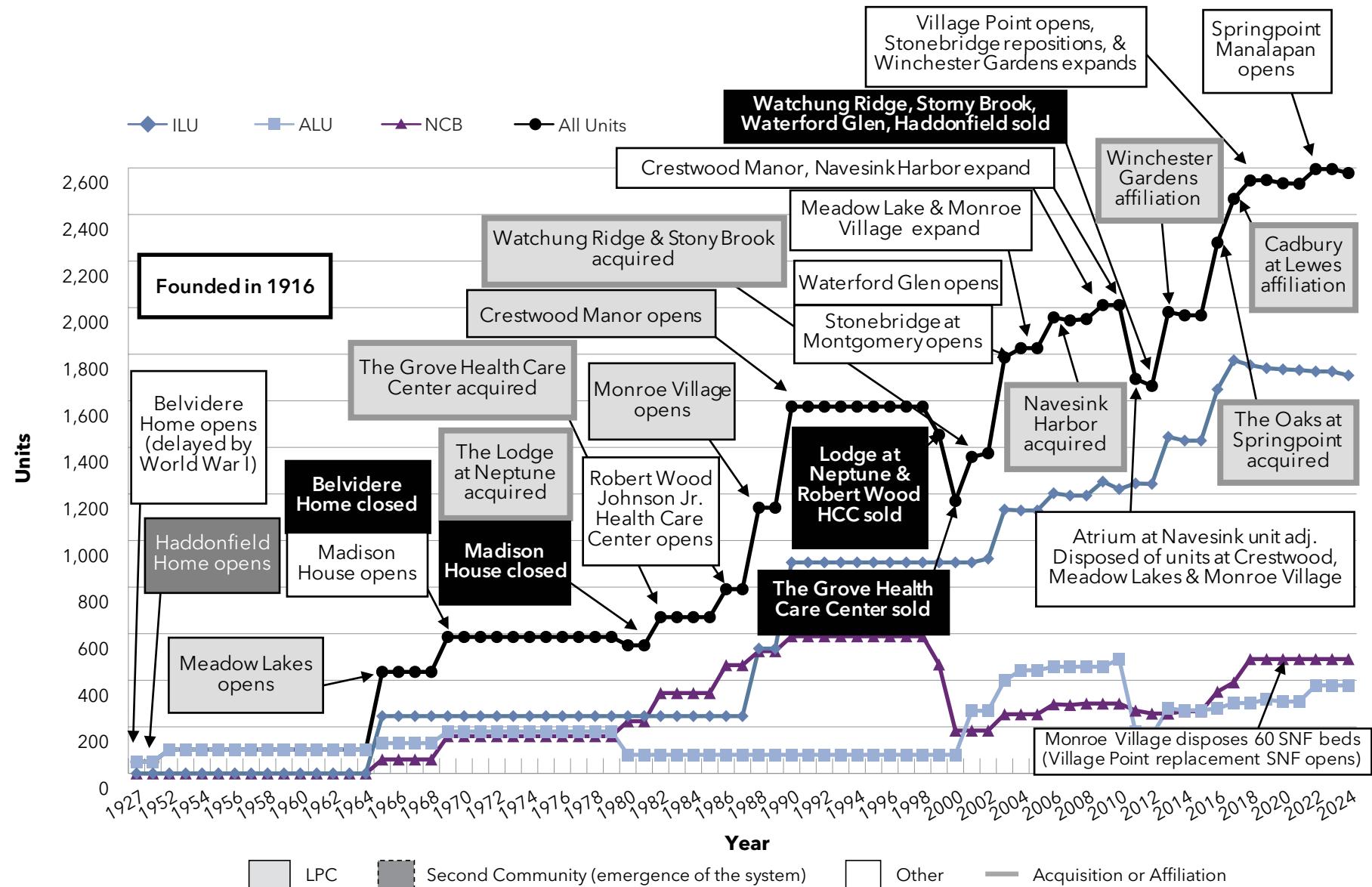


Growth: Pace of Growth Asbury Communities (MD)



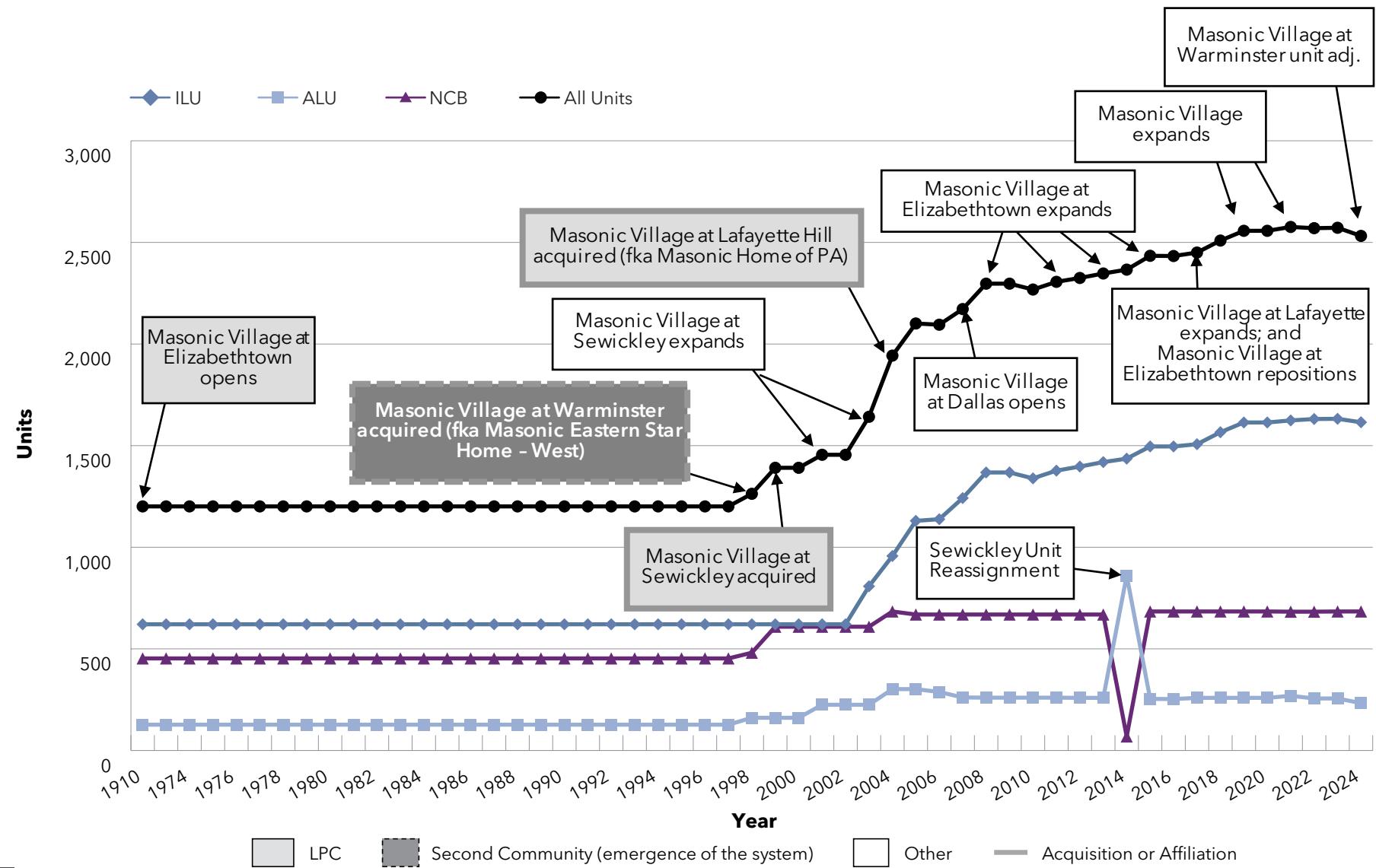
Growth: Pace of Growth

Springpoint (NJ)



Growth: Pace of Growth

Masonic Villages of the Grand Lodge (PA)



Growth: Aggregate Growth

Aggregate Growth

Section 5-3 of the report details the pace of growth among the LZ 200 organizations in terms of average annual growth and aggregate growth. These tables list the organizations within the LZ 200 that have increased in size the fastest between 2023 and 2024, 2000 and 2024, and 1990 and 2024 (Charts 5-3a-c).

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



Growth: Aggregate Growth

Organizations by Aggregate Growth, by Period

2025 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/24)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2024 (n=200)						
40	Eventide & Tabitha	MN	37.92%	61.09%	686	1,186
59	Sun Health Senior Living	AZ	35.12%	54.13%	485	1,381
37	Kintura fka Brightspire & Well-Spring Group	NC	34.92%	53.66%	652	1,867
61	EveryAge	NC	28.39%	39.64%	379	1,335
38	Masonicare	CT	27.82%	38.54%	511	1,837
Growth from 2000 to 2024 (n=180)						
19	Transforming Age	WA	796.62%	11.56%	720	3,262
1	National Senior Communities	DC	789.06%	11.48%	1,458	23,329
146	Smith Senior Living	IL	591.30%	9.80%	0	636
16	Concordia Lutheran Ministries	PA	461.17%	8.38%	466	3,642
20	BHI Senior Living	IN	410.41%	7.71%	423	3,236
Growth from 1990 to 2024 (n=194)						
4	Presbyterian Homes and Services	MN	1156.20%	8.81%	232	10,238
97	Givens Communities	NC	932.61%	8.00%	17	950
44	Loretto	NY	879.07%	7.78%	0	1,809
40	Eventide & Tabitha	MN	827.69%	7.56%	686	1,186
12	Pacific Retirement Services	OR	824.29%	7.54%	0	1,141

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

Growth: Aggregate Growth

Organizations by Growth in Units, by Period

2025 Rank	System Name	State	Growth*		Total Units (as of 12/31/24)
			Units Added	Average Annual Growth (%)	
Growth in 2024 (n=200)					
1	National Senior Communities	DC	1,458	6.25%	23,329
19	Transforming Age	WA	720	22.07%	3,236
40	Eventide & Tabitha	MN	686	37.92%	1,186
37	Kintura fka Brightspire & Well-Spring Group	NC	652	34.92%	1,867
14	EverTrue fka Lutheran Senior Services	MO	593	15.58%	3,806
Growth from 2000 to 2024 (n=180)					
1	National Senior Communities	DC	20,705	789.06%	23,329
4	Presbyterian Homes and Services	MN	7,557	281.87%	10,238
7	Acts Retirement-Life Communities	PA	4,782	83.18%	10,531
9	HumanGood	CA	3,406	126.81%	6,092
10	Concordia Lutheran Ministries	PA	2,993	461.17%	3,642
Growth from 1990 to 2024 (n=194)					
4	Presbyterian Homes and Services	MN	9,423	1156.20%	10,238
3	Acts Retirement-Life Communities	PA	5,600	113.57%	10,531
6	HumanGood	CA	4,071	201.43%	6,092
12	Pacific Retirement Services	OR	3,767	824.29%	4,224
14	EverTrue fka Lutheran Senior Services	MO	3,115	450.80%	3,806

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

Growth: Aggregate Growth

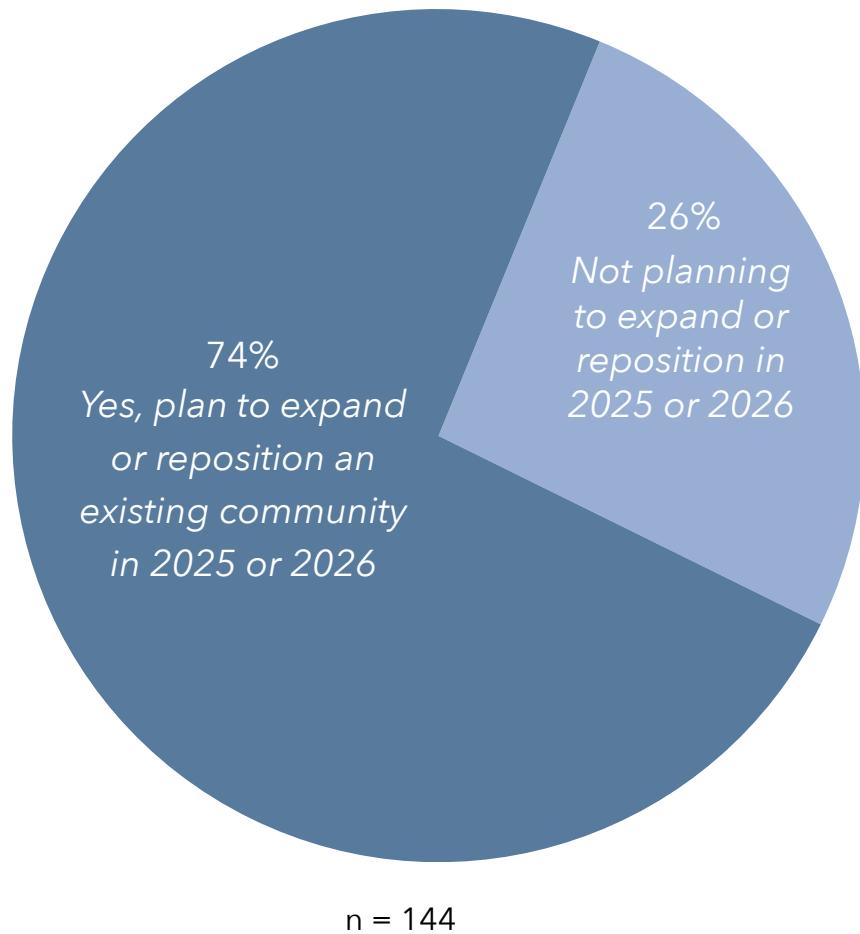
Organizations by Aggregate Growth for the Largest Systems (Over 2,000 Units)

2025 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/24)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2024 (n=26)						
19	Transforming Age	WA	22.07%	28.32%	720	3,262
14	EverTrue fka Lutheran Senior Services	MO	15.58%	18.46%	593	3,806
20	BHI Senior Living	IN	13.07%	15.04%	423	3,236
16	Concordia Lutheran Ministries	PA	12.80%	14.67%	466	3,642
17	Otterbein SeniorLife	OH	10.09%	11.22%	364	3,608
Growth from 2000 to 2024 (n=26)						
19	Transforming Age	WA	798.62%	11.56%	720	3,262
1	National Senior Communities	DC	789.06%	11.48%	1,458	23,329
16	Concordia Lutheran Ministries	PA	461.17%	8.38%	466	3,642
20	BHI Senior Living	IN	410.41%	7.71%	423	3,236
31	National Church Residences	OH	385.49%	7.36%	0	2,141
Growth from 1990 to 2024 (n=26)						
4	Presbyterian Homes and Services	MN	1,156.20%	8.81%	232	10,238
12	Pacific Retirement Services	OR	824.29%	7.54%	0	4,224
19	Transforming Age	WA	629.75%	6.55%	720	3,262
20	BHI Senior Living	IN	559.06%	6.11%	423	3,236
32	Christian Care Companies	AZ	551.38%	6.06%	-48	2,117

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

Growth: Future Growth Plans

Percentage Planning to Expand or Reposition in Next Two Years

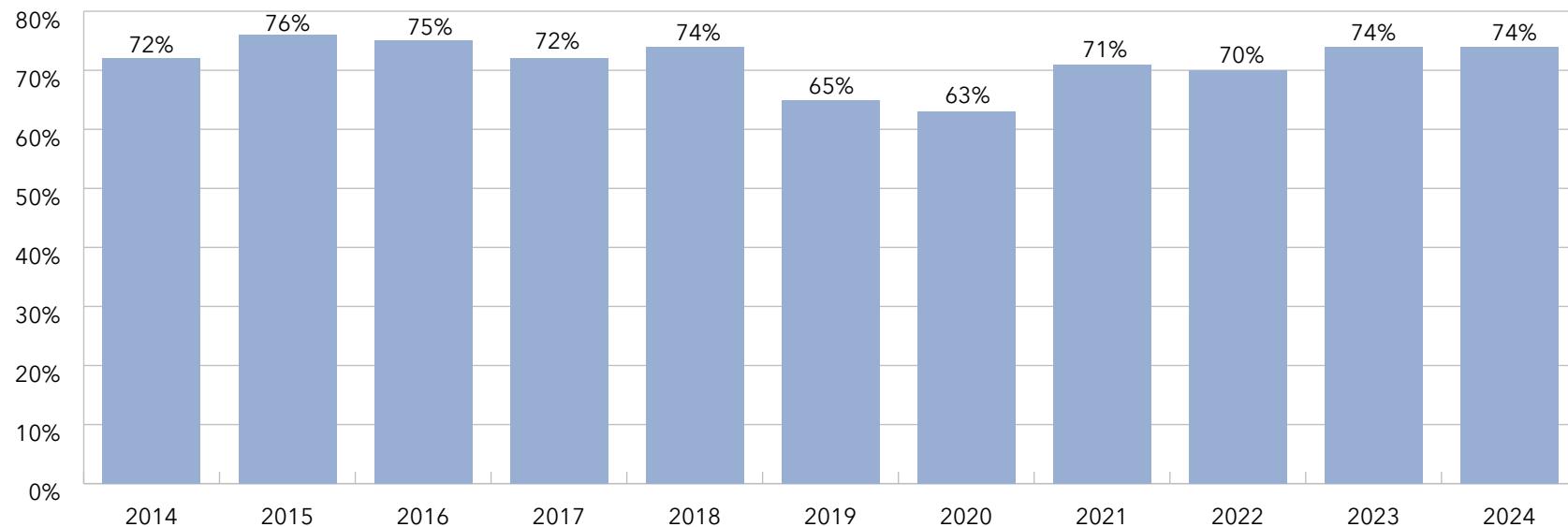


Future Growth Plans

Arguably, much information can be gathered about potential future growth, whether it would be in the form of bricks-and-mortar or expanding home and community-based services. For purposes of the LZ 200, feedback is gathered on the intent to grow through affiliation, new campus development, or expansion in the next two years. Roughly 74% of the LZ 200 reported intentions to expand or reposition an existing campus in 2025 or 2026. Roughly 13% reported that they intend to grow via the construction of new communities while 32% responded 'maybe' to this type of growth in 2025 or 2026. Another 15% reported that they intend to grow from affiliation while 31% may consider affiliation in 2025 or 2026.

Growth: Future Growth Plans

Percentage Planned Expansions or Repositions Since 2014

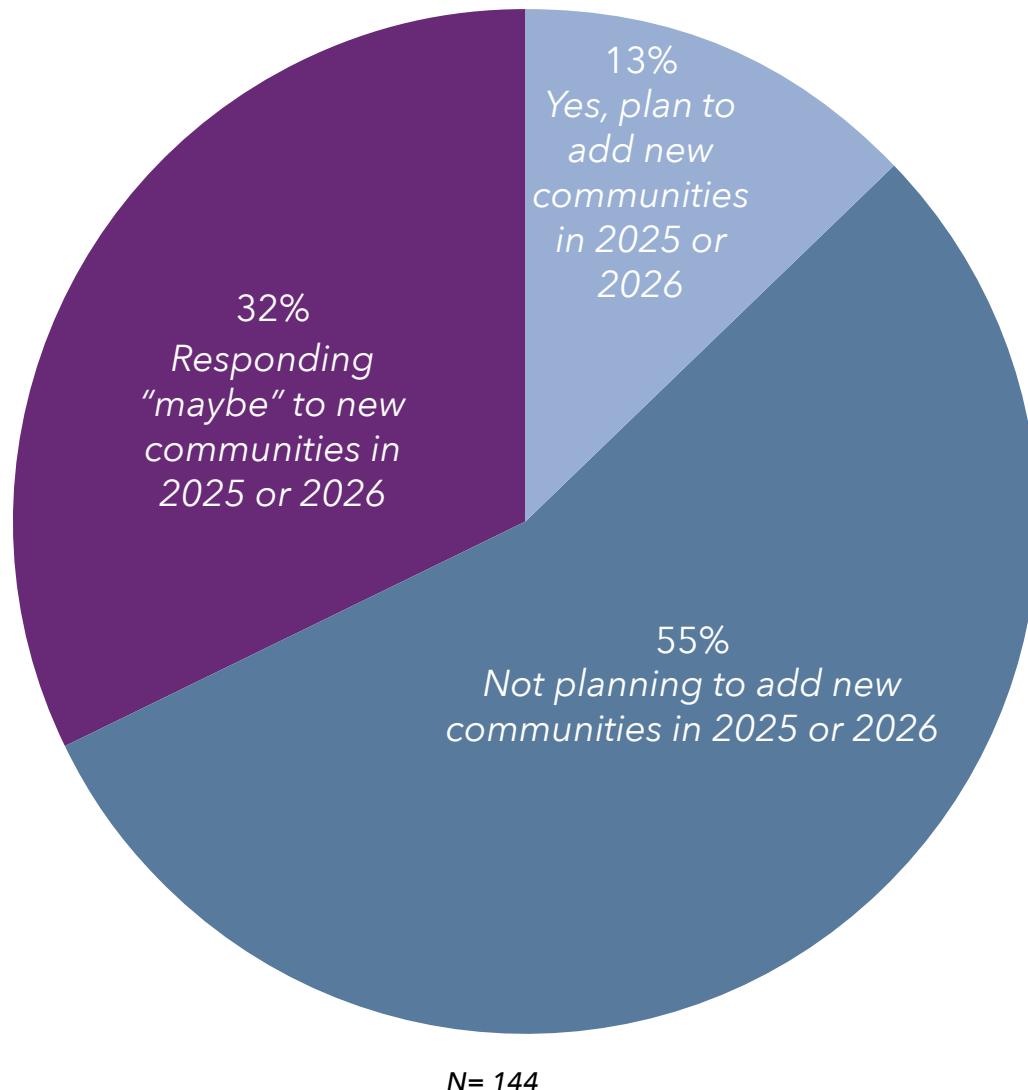


KEY: Yes, plan to expand or reposition an existing community

n = 144

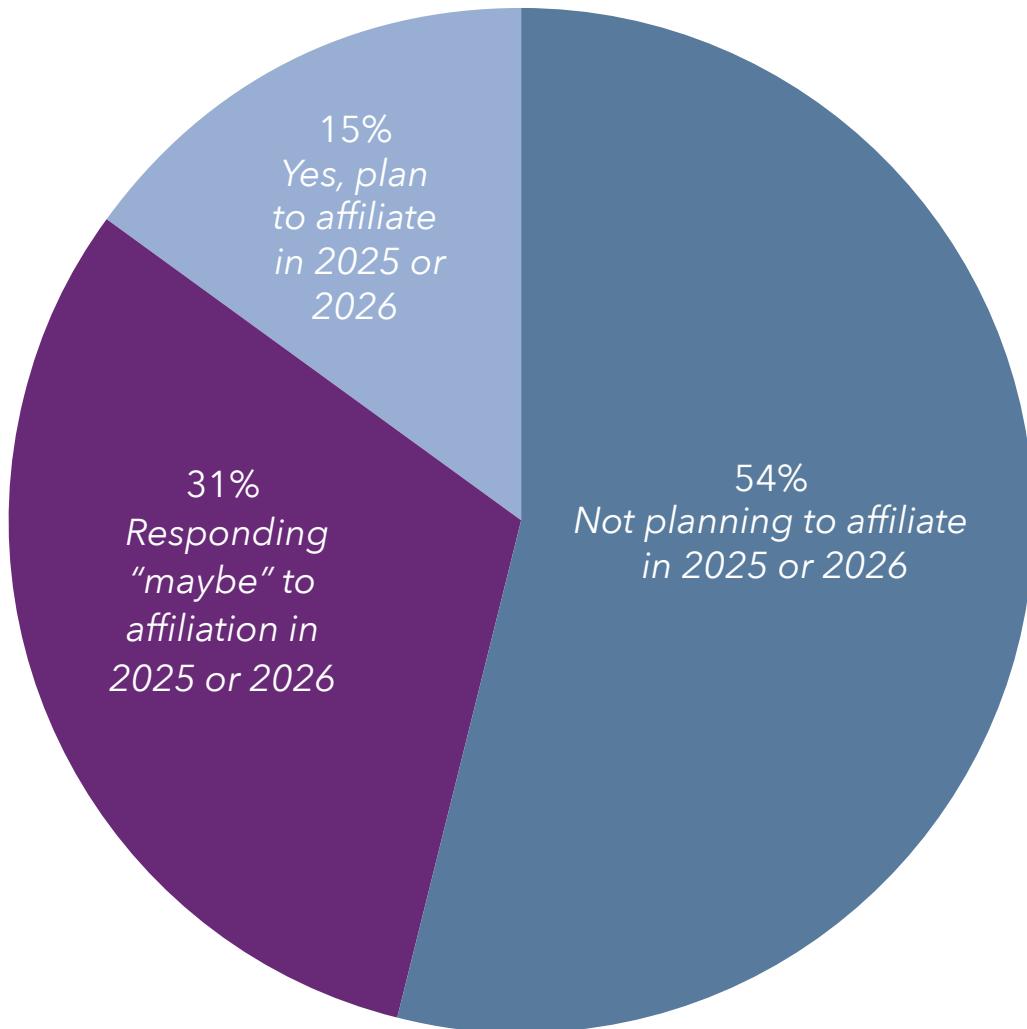
Growth: Future Growth Plans

Percentage Planning to Add A New Community Through Development



Growth: Future Growth Plans

Percentage Planning to Grow Through Affiliation



N= 144

Growth: Type of Growth by Organizations

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

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

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

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

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

Disposition: The sale or closure of a community.

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

The charts at 5-6a-c analyze how communities have changed through the above-described venues over a 10, 20, and greater than 30-year period (1980-2024). More than 1,535 communities have been added from campus expansion since 1980 (Chart 5-6a). Dispositions have also increased dramatically. Of the 372 community dispositions that occurred from 1980-2024 among the LZ 200 (Chart 5-6a), roughly 349 of these dispositions occurred in approximately the last decade (Chart 5-6c). The most common dispositions in recent years have been free-standing nursing homes or assisted living and financially distressed Life Plan Communities.

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

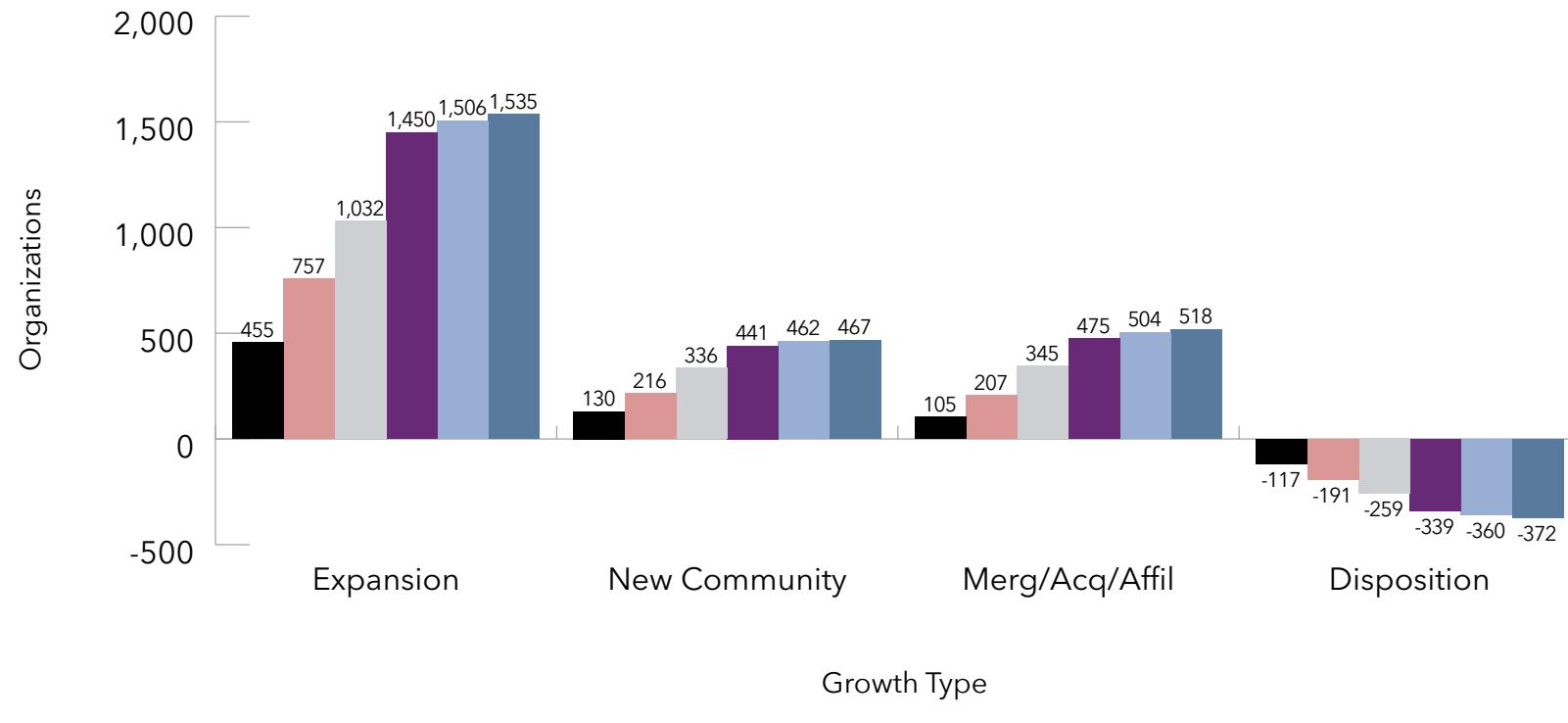
Growth: Type of Growth by Organizations

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



Growth: Type of Growth by Organizations

Number of Organizations Changing, by Growth Type, 1980 through 2024



KEY:



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

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

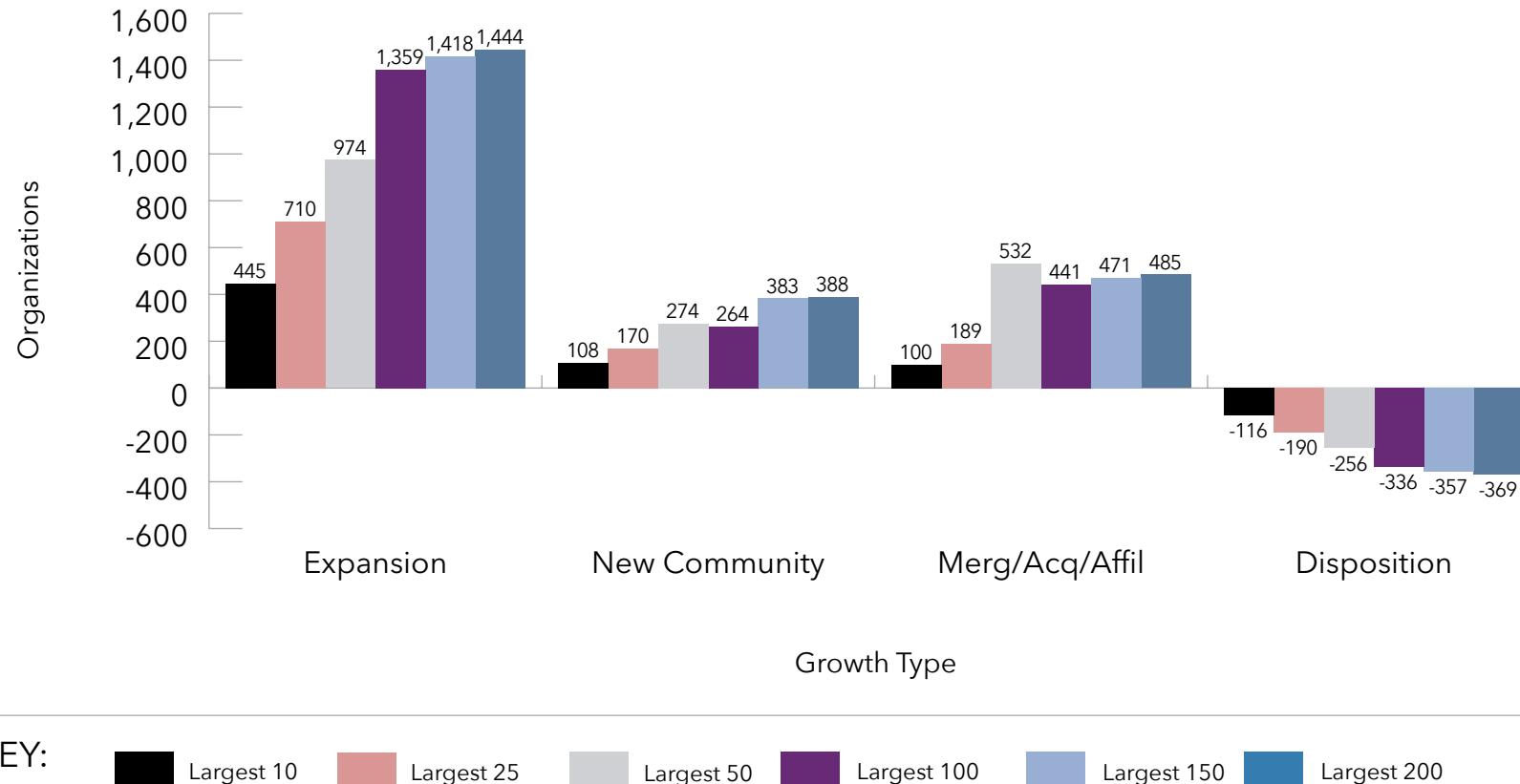
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Organizations

Number of Organizations Changing, by Growth Type, 1990 through 2024



KEY:

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

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

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

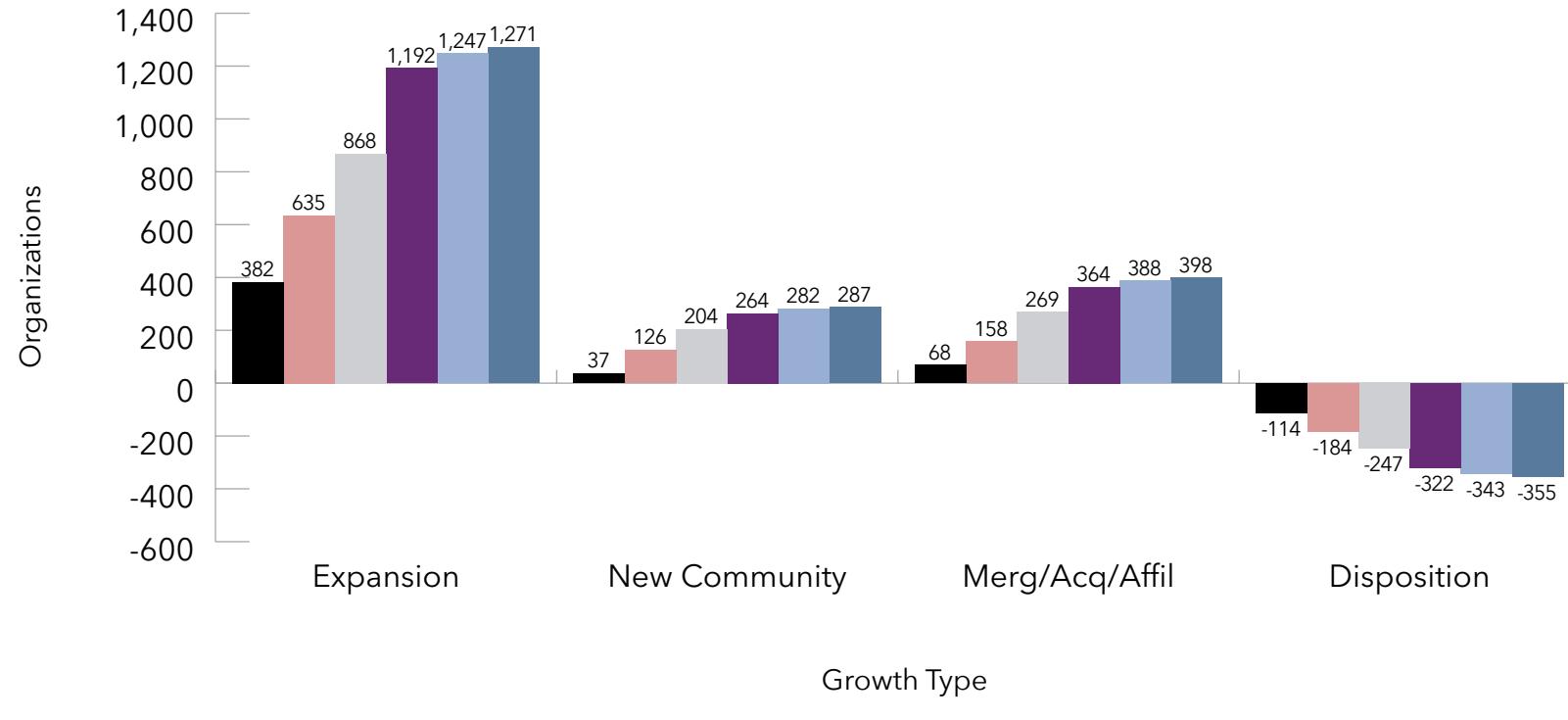
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Organizations

Number of Organizations Changing, by Growth Type, 2000 through 2024



KEY:



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

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

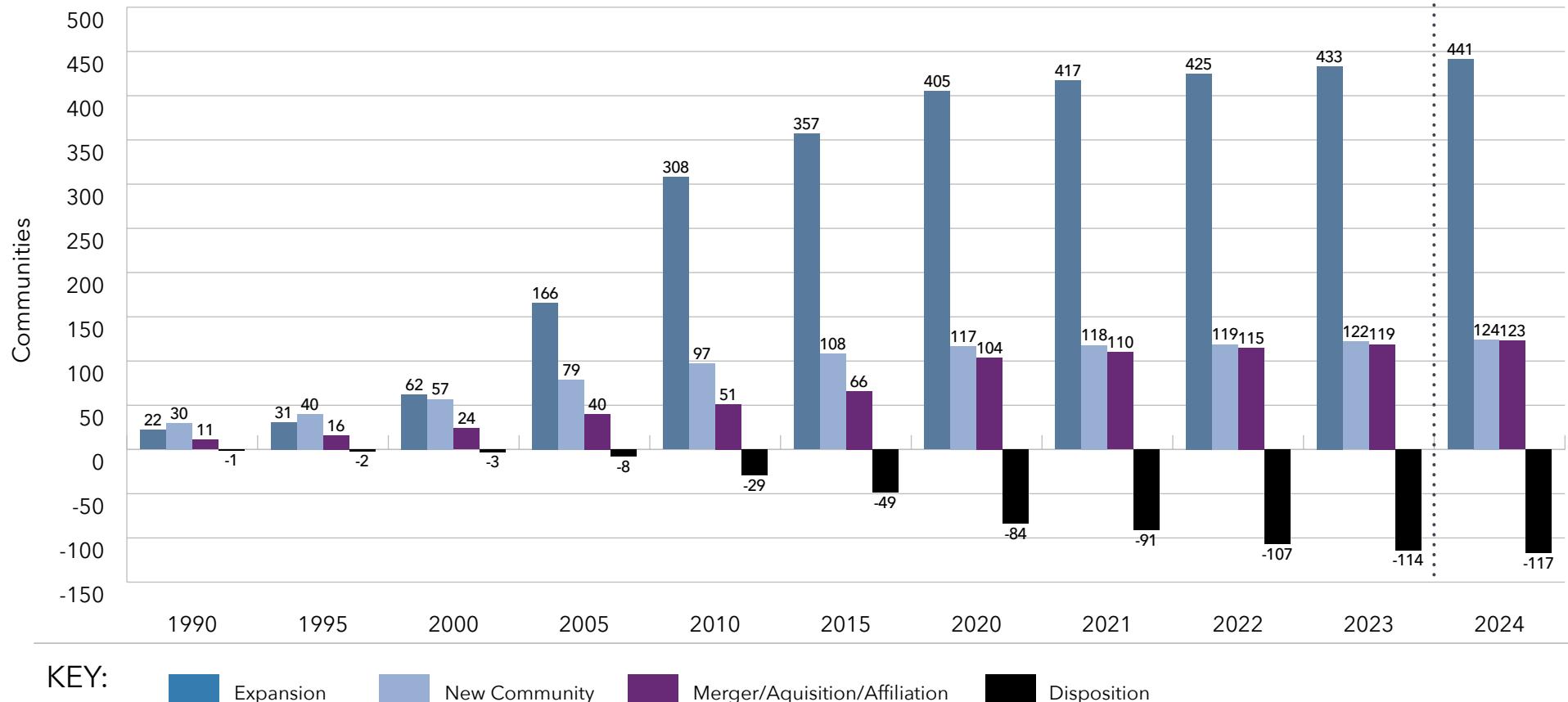
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Cumulative Growth of Largest 10 Systems



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

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

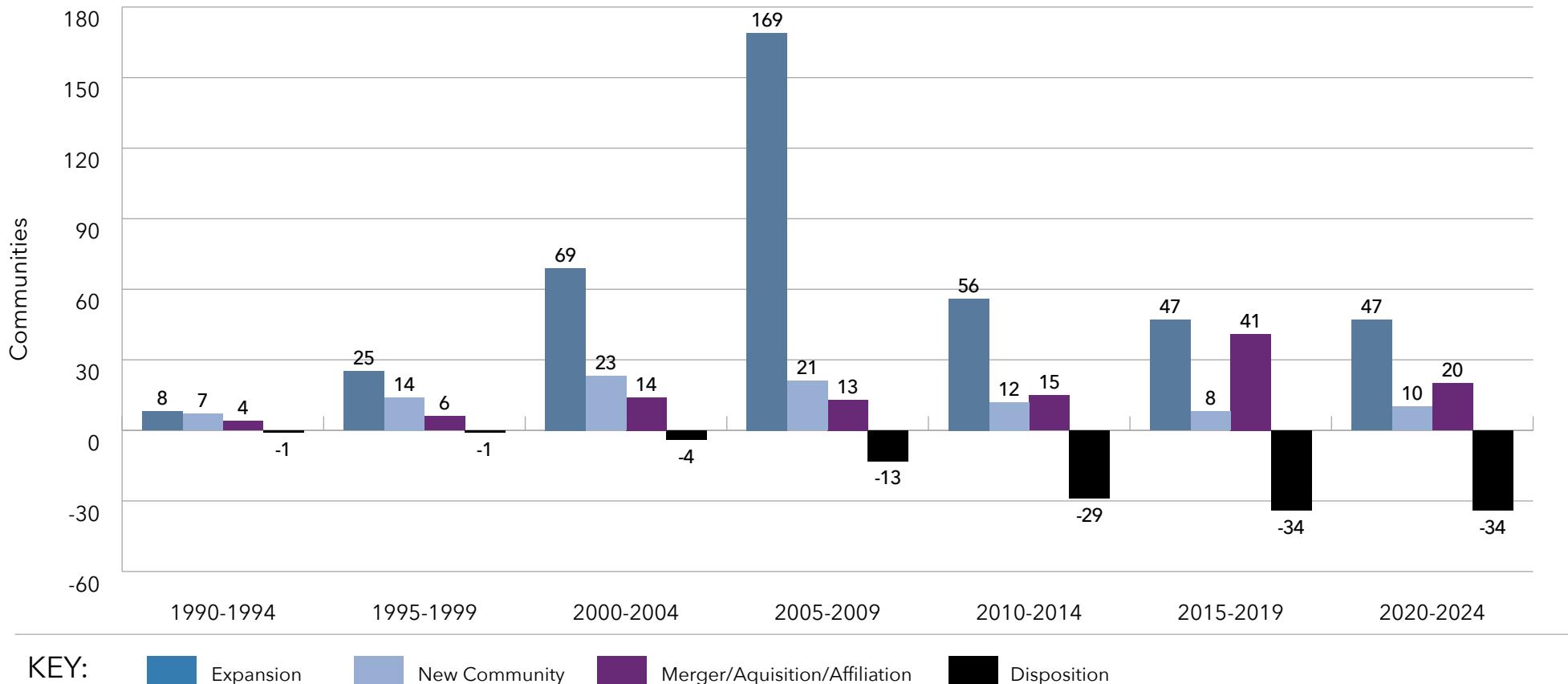
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Incremental Growth of Largest 10 Systems



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

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

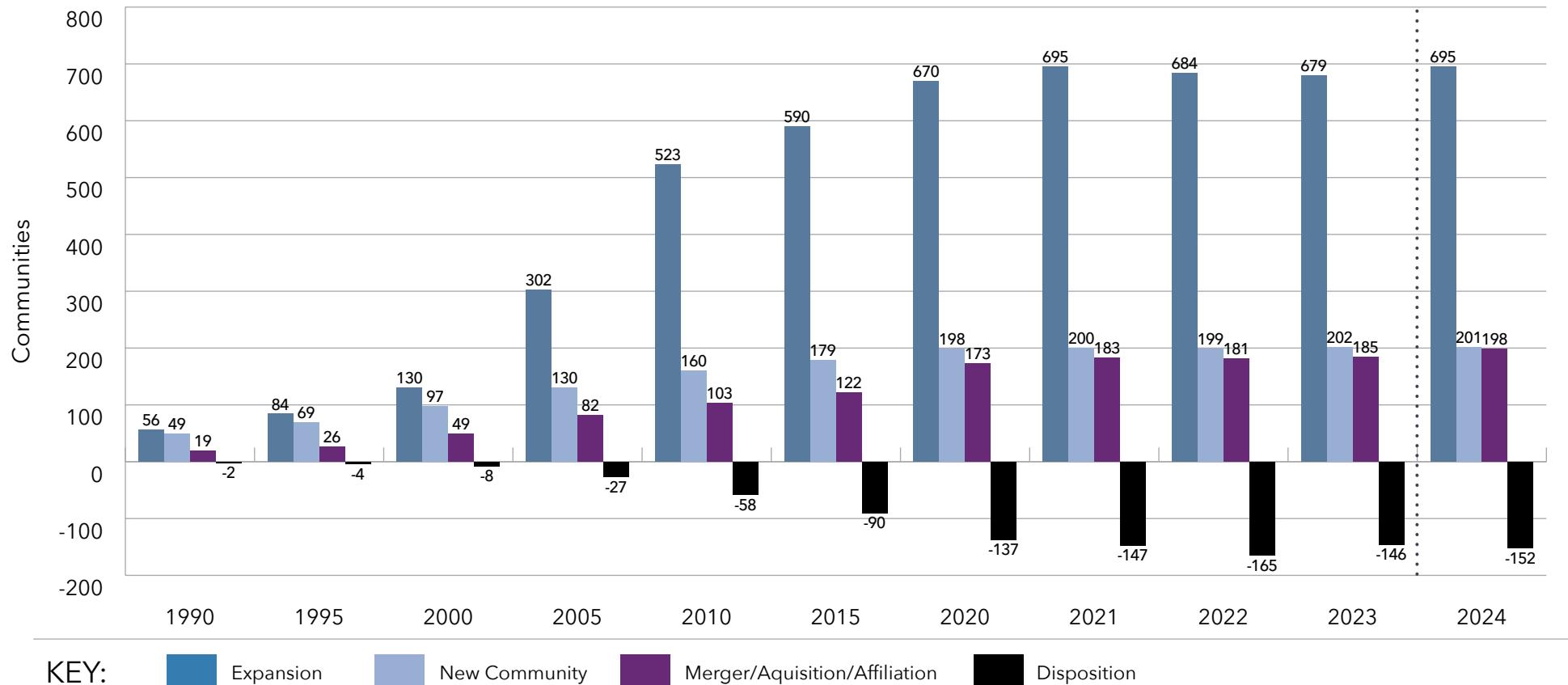
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Cumulative Growth of Largest 25 Systems



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

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

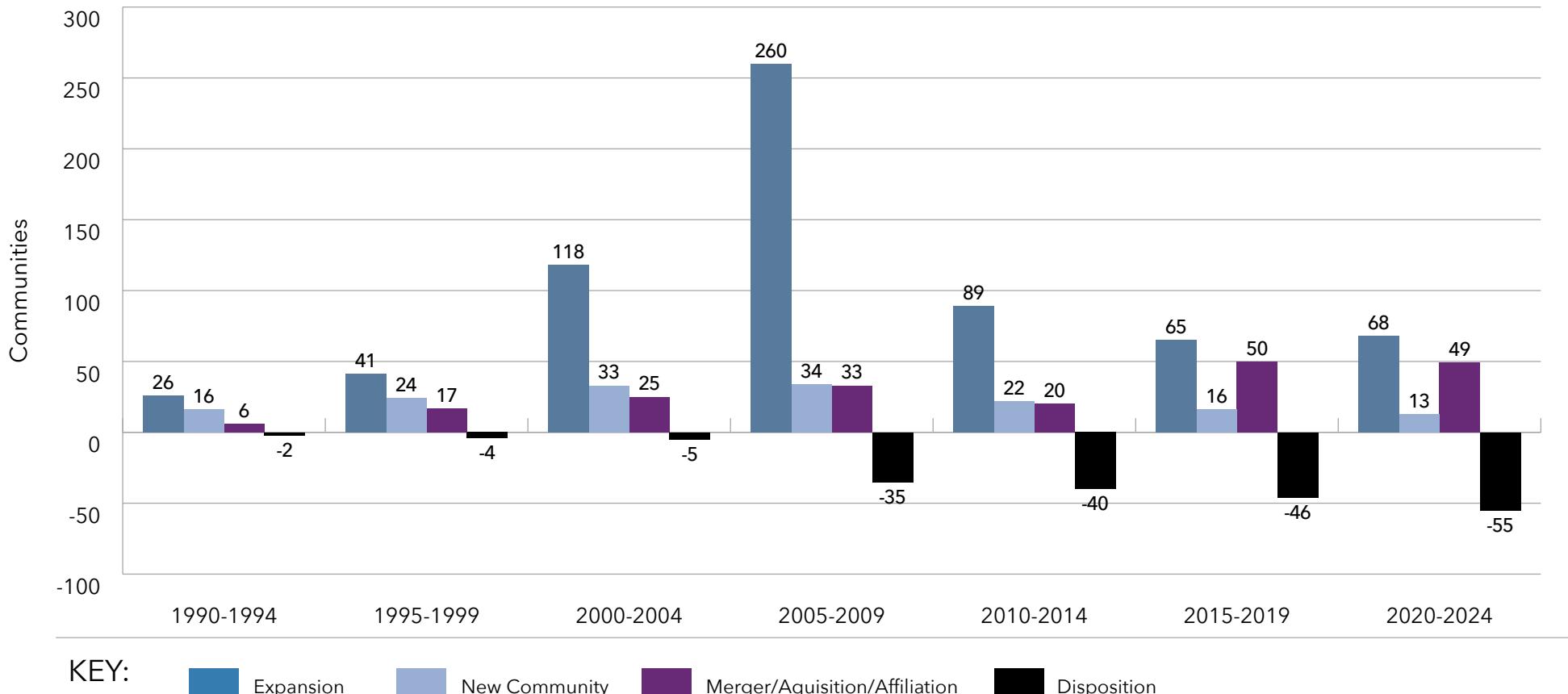
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Incremental Growth of Largest 25 Systems



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

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

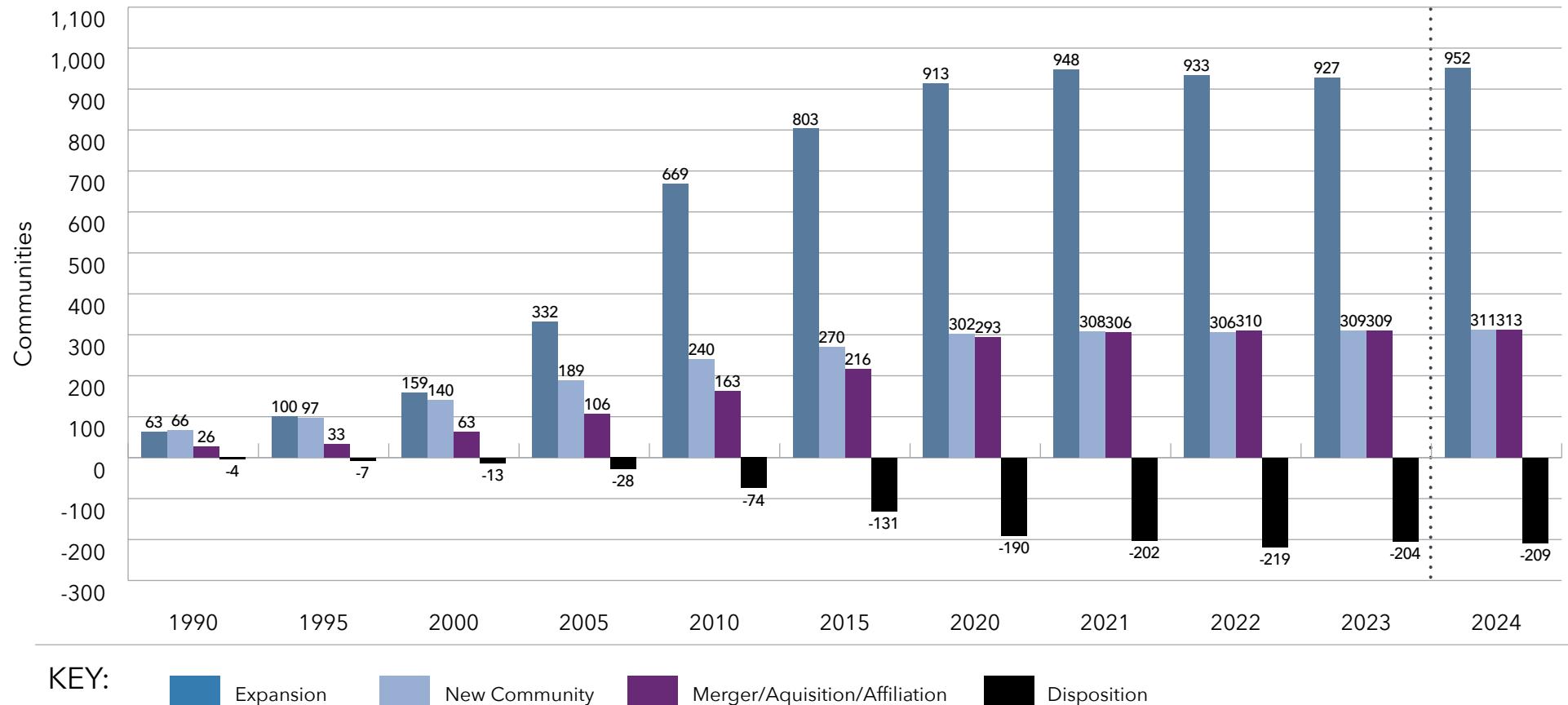
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Cumulative Growth of Largest 50 Systems



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

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

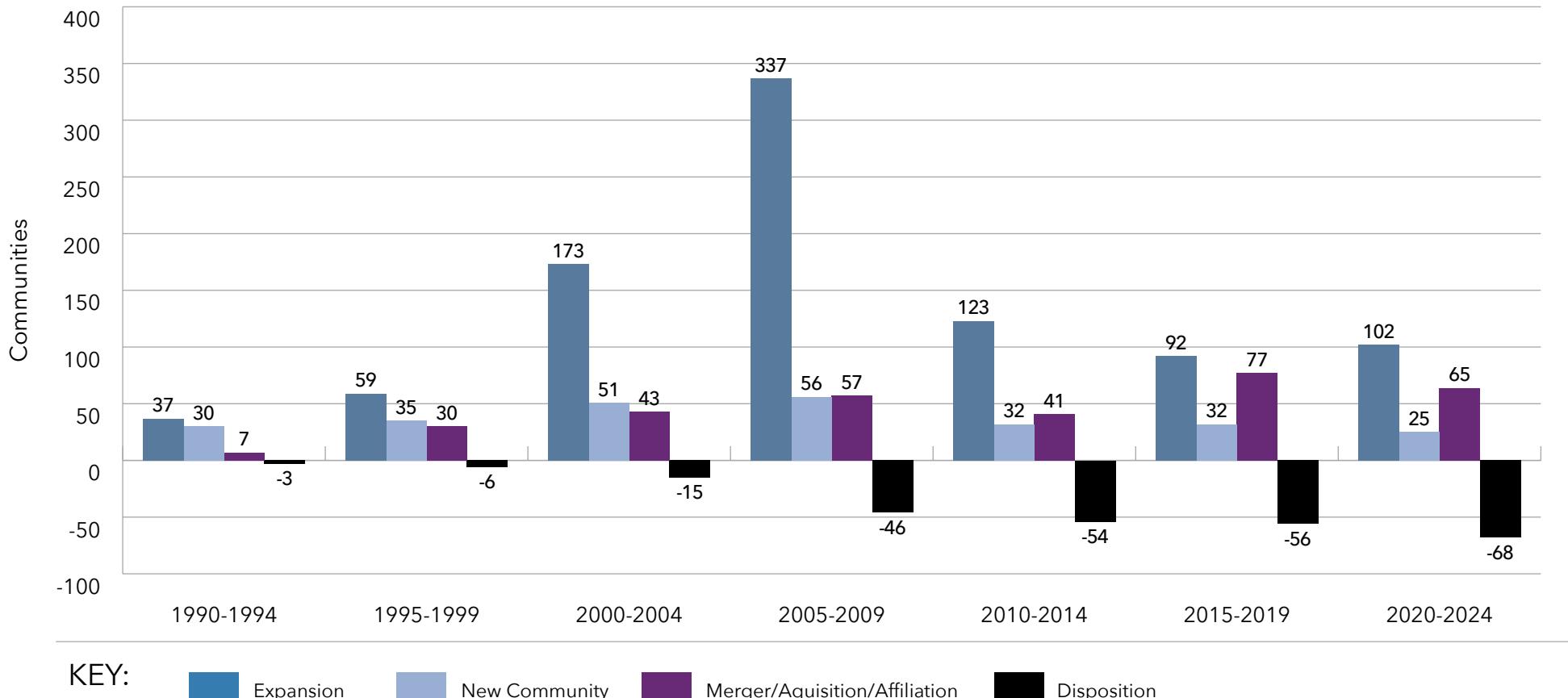
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Incremental Growth of Largest 50 Systems



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

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

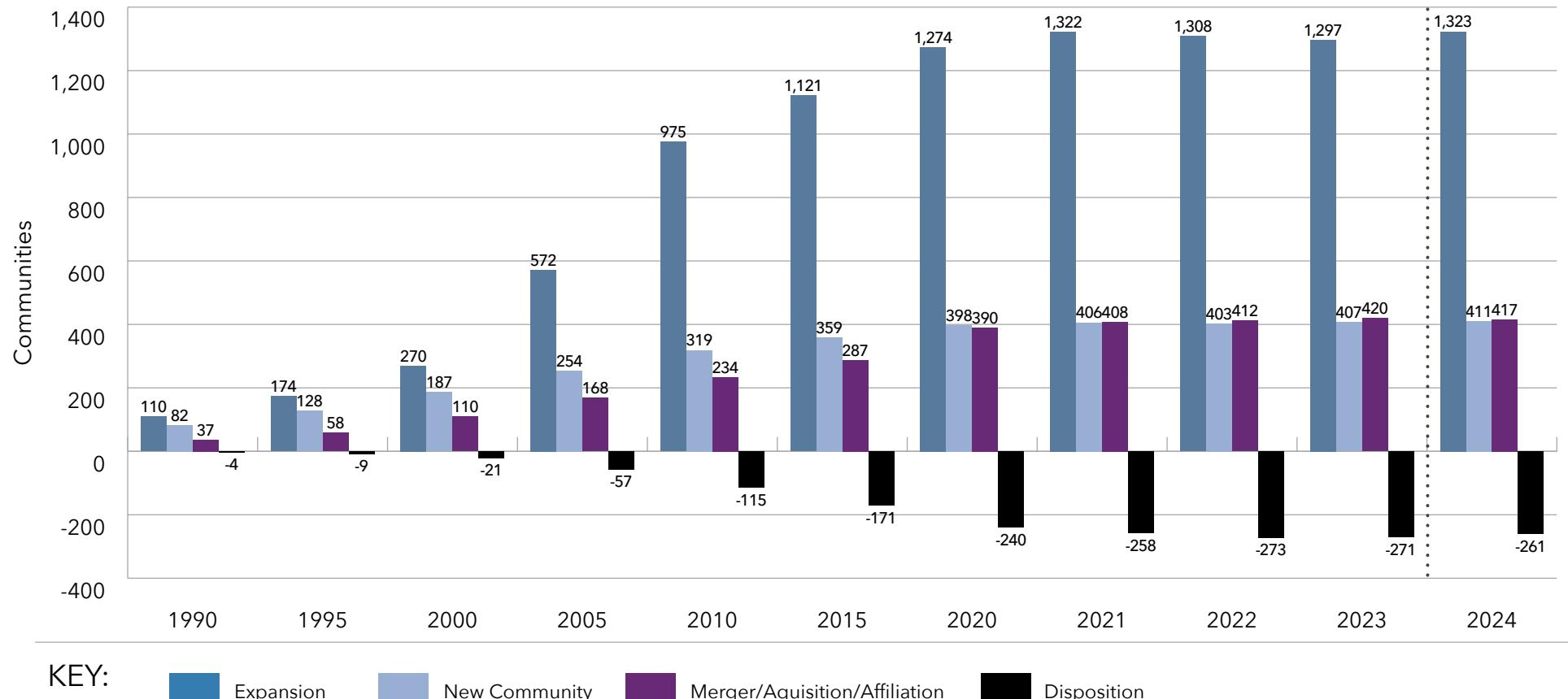
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Cumulative Growth of Largest 100 Systems



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

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

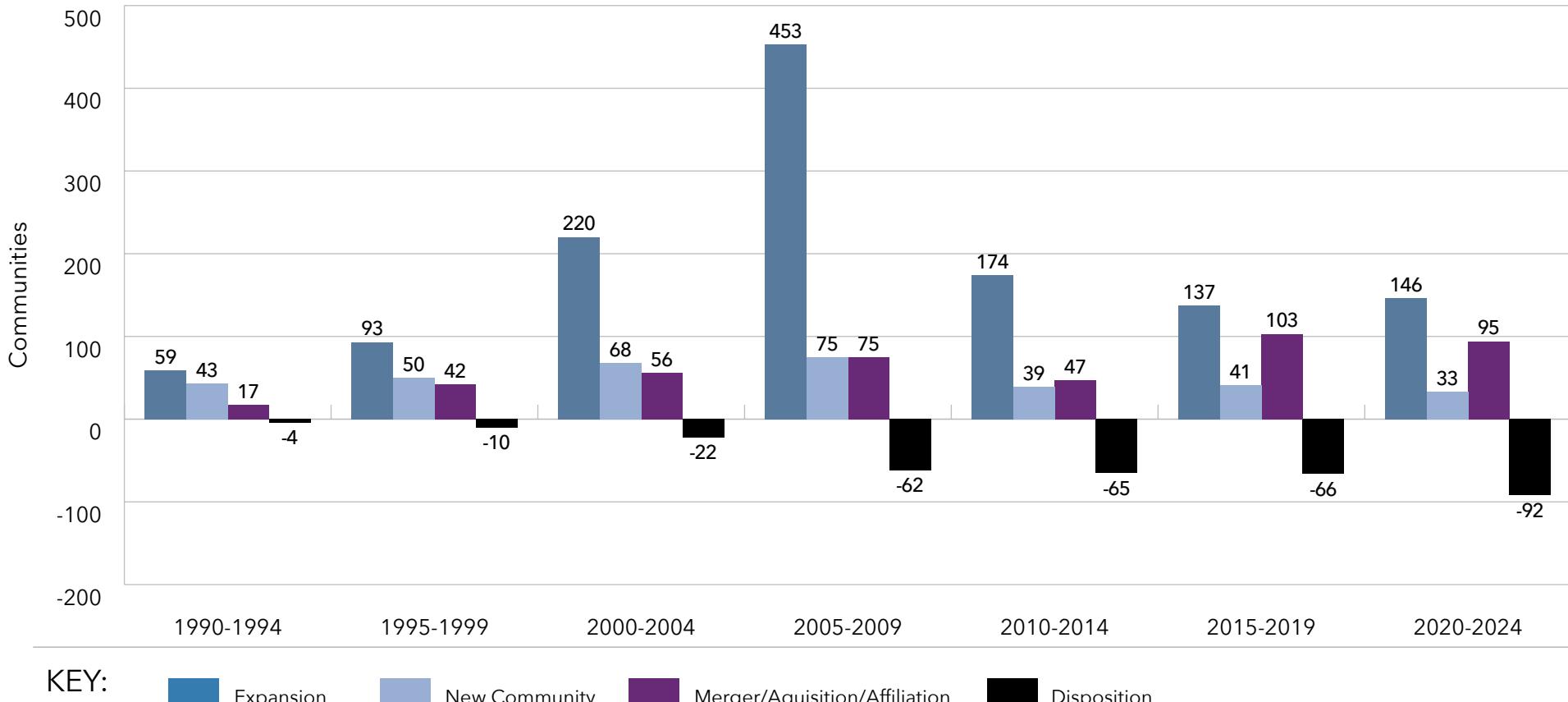
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Incremental Growth of Largest 100 Systems



KEY:

Expansion

New Community

Merger/Aquisition/Affiliation

Disposition

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

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

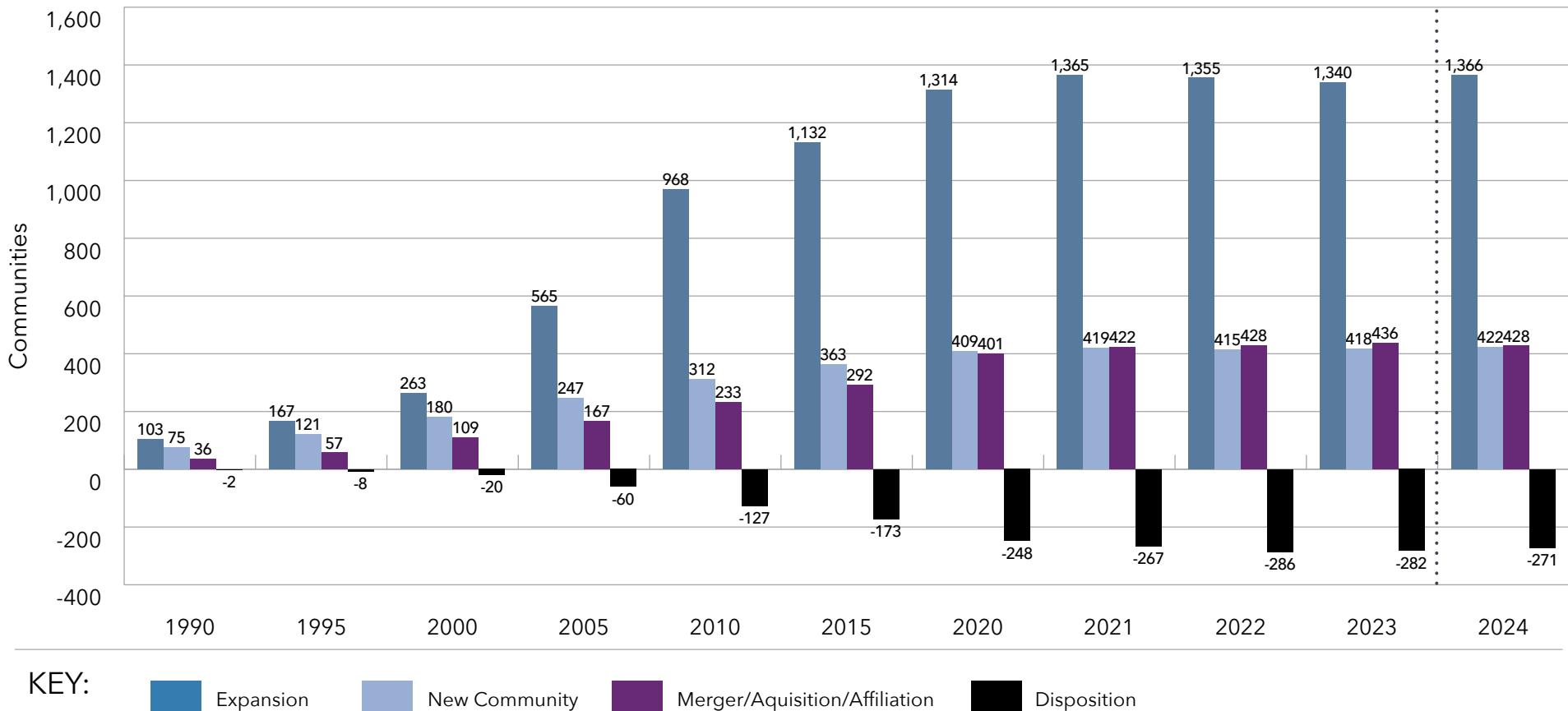
Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth of Communities

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.

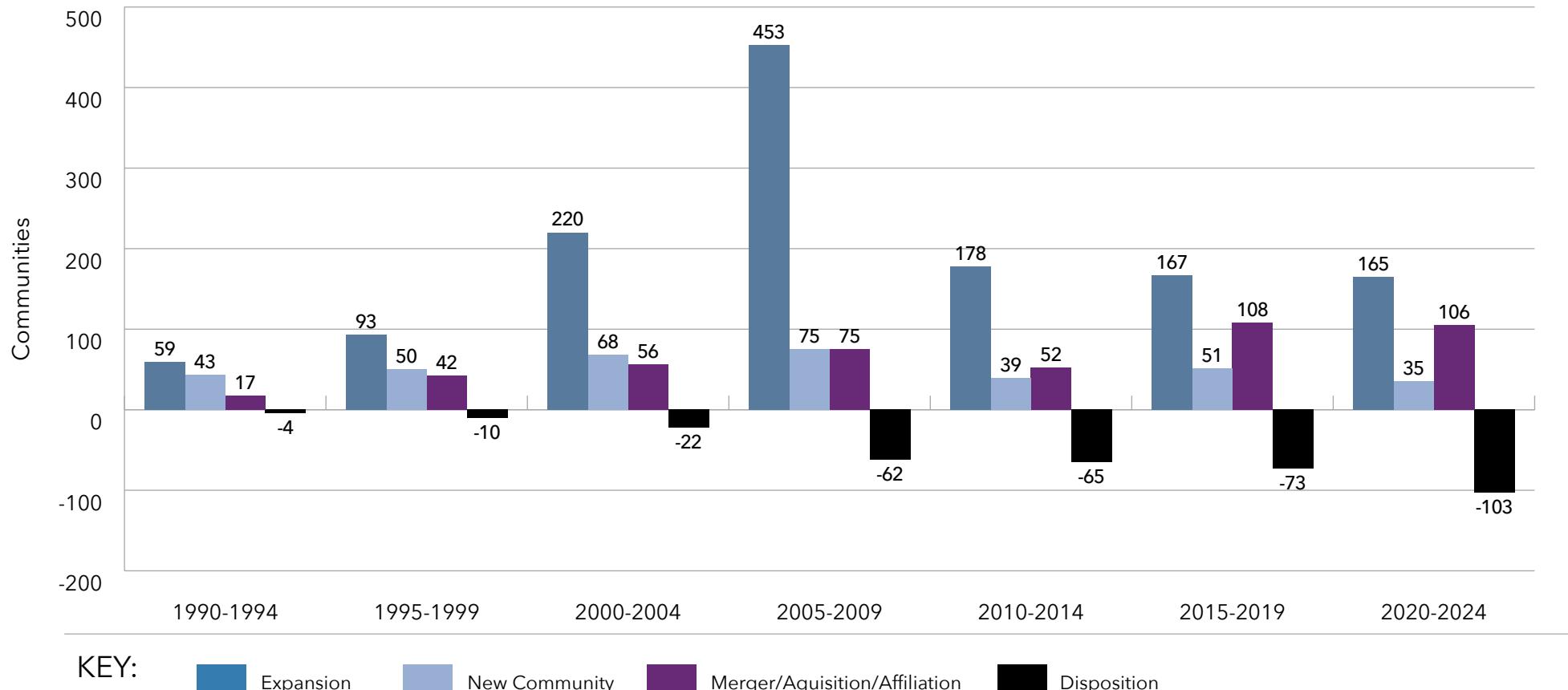
Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Incremental Growth of Largest 150 Systems



KEY:



Expansion



New Community



Merger/Aquisition/Affiliation



Disposition

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

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

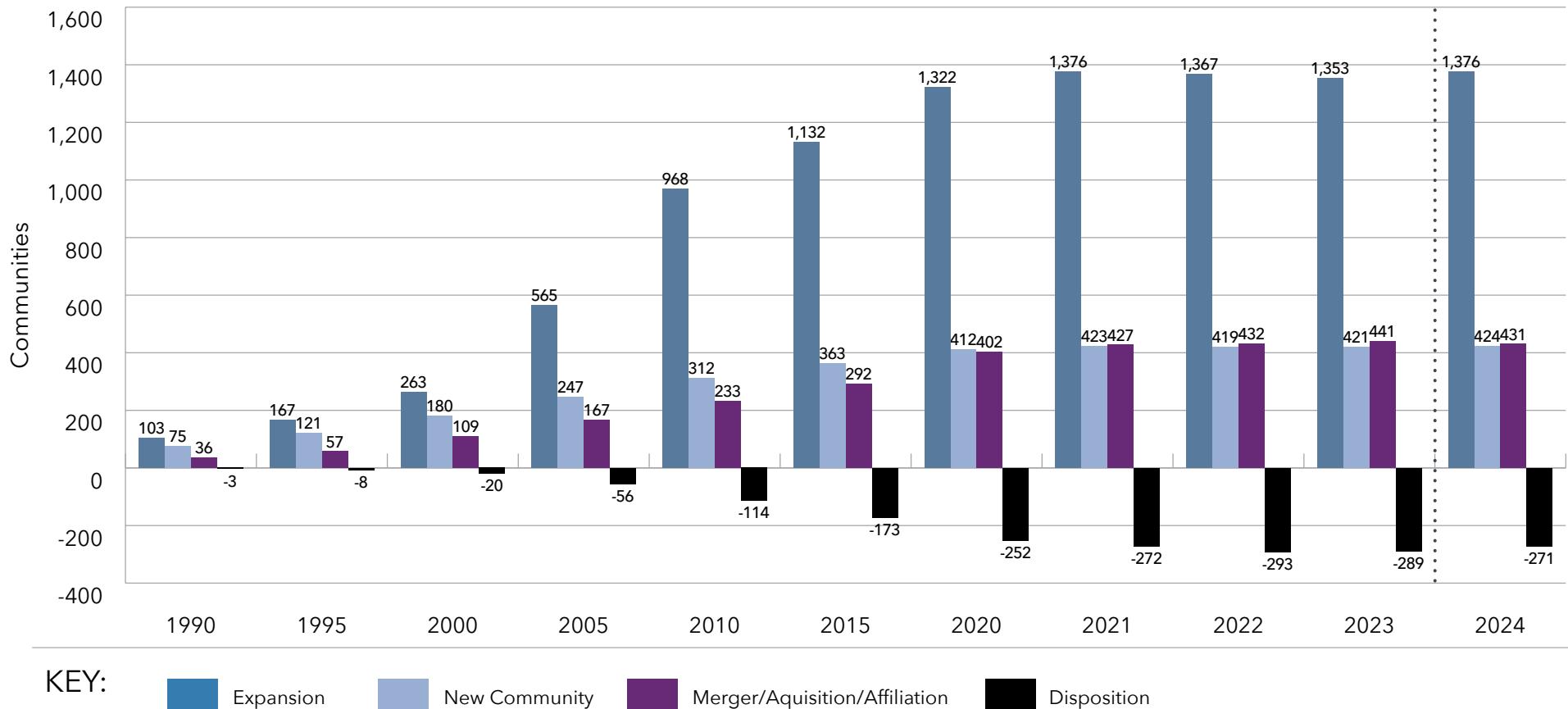
Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Cumulative Growth Of Largest 200 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.

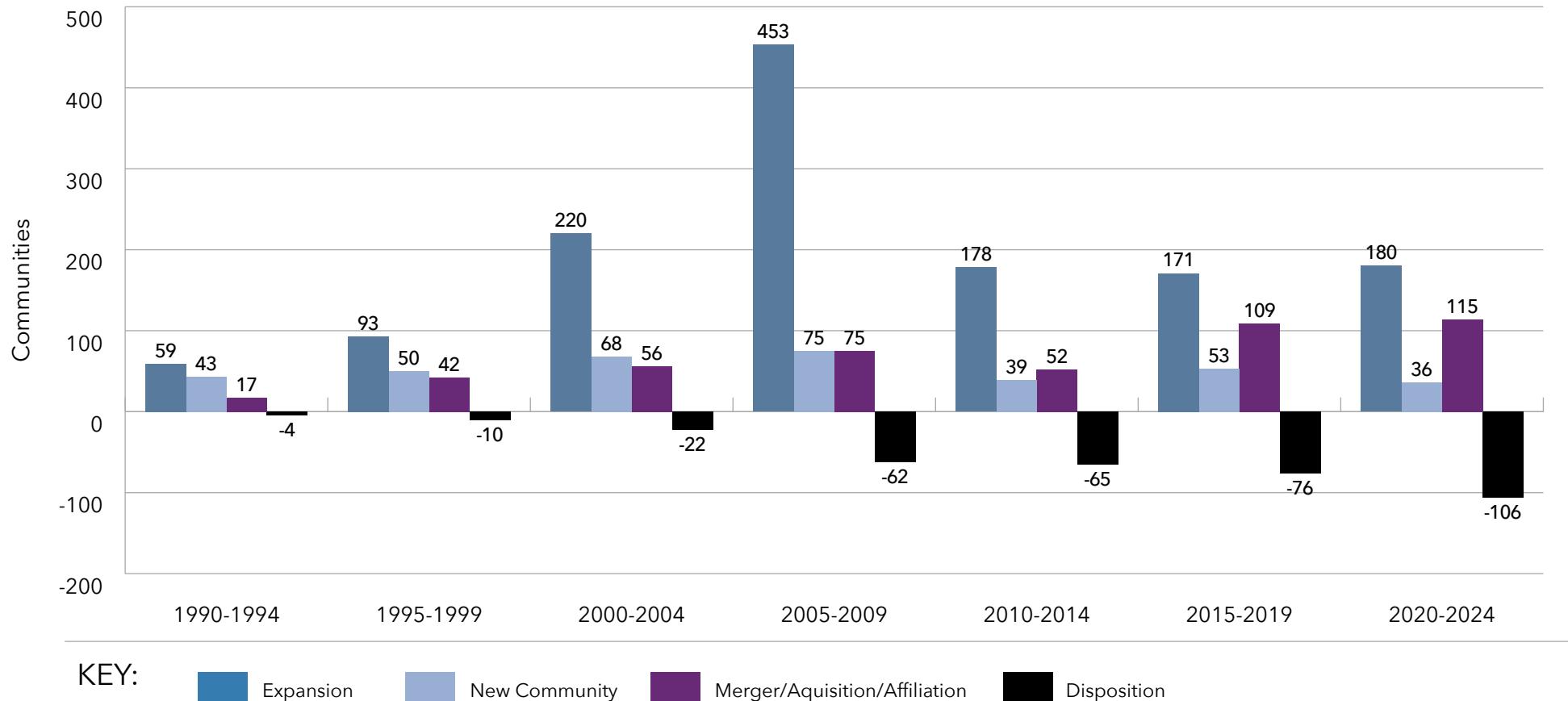
Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Incremental Growth Of Largest 200 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.

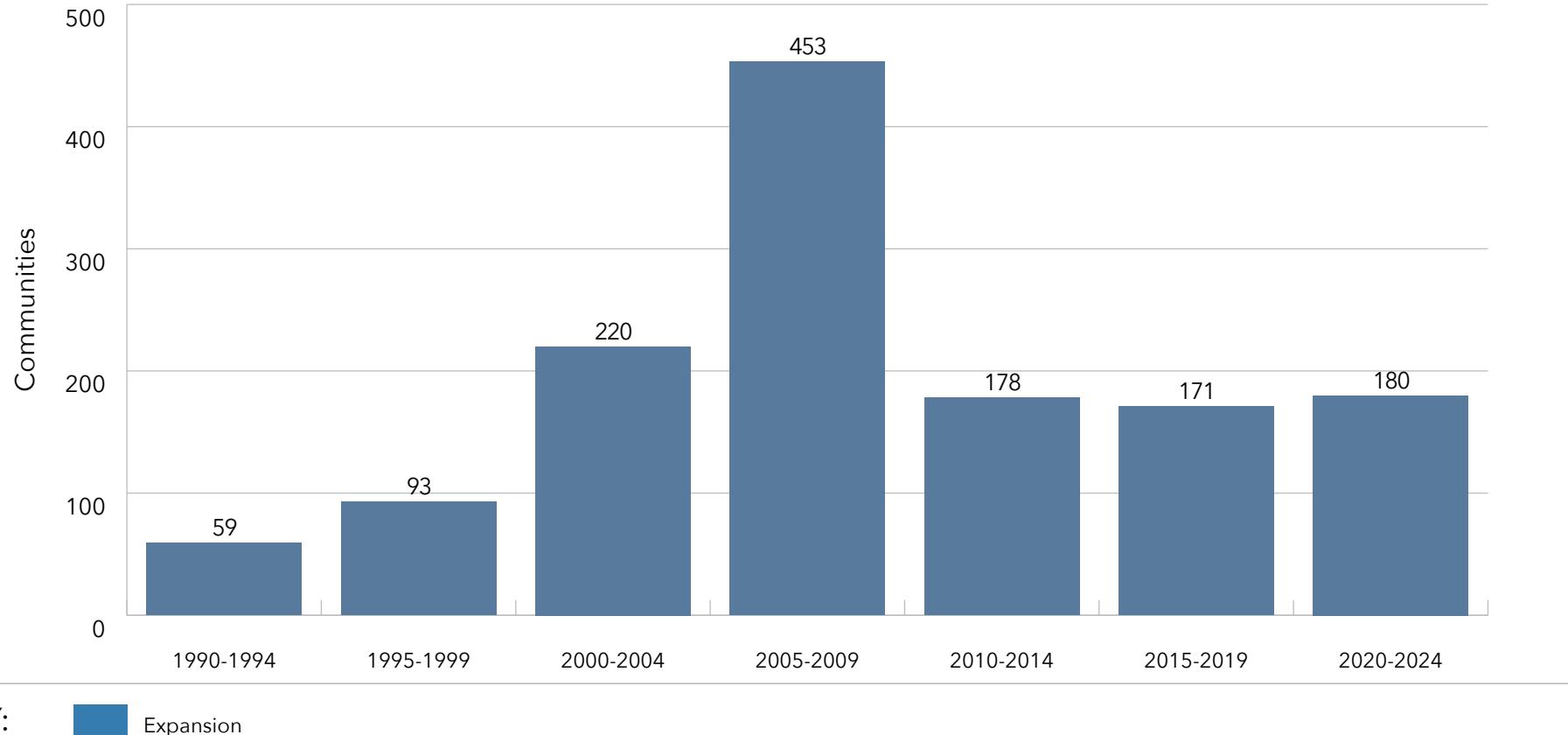
Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

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

Disposition: The sale or closure of a community.

Growth: Expansions

Historical Growth Of Largest 200 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.

Growth: Expansions

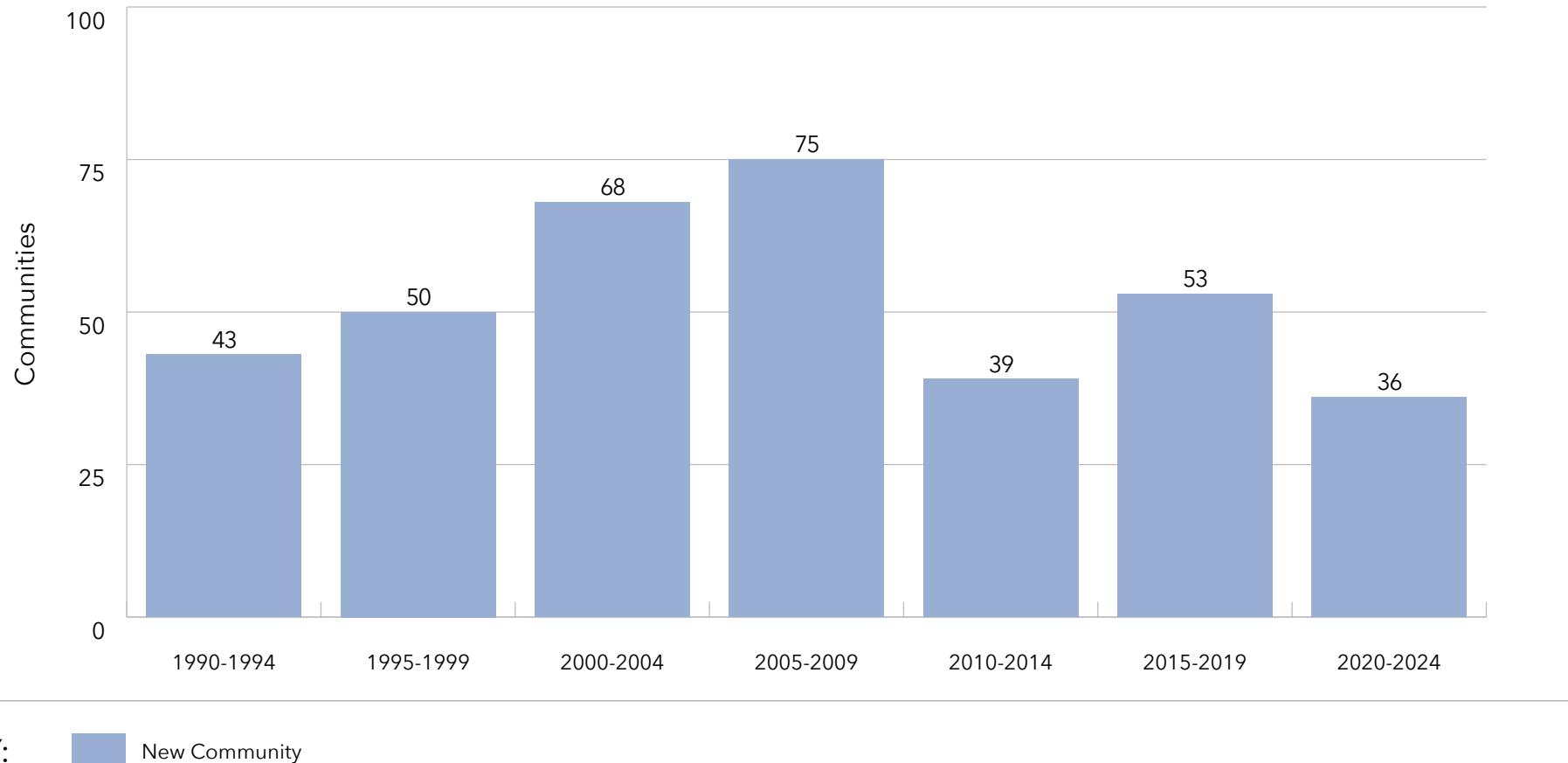
2024 Community Expansions

2025 Rank	System Name	Community	City	State	Community Type
1	National Senior Communities	Avery Point	Richmond	VA	IL
1	National Senior Communities	Ashby Ponds	Loudoun	VA	IL
1	National Senior Communities	Tallgrass Creek	Overland Park	KS	IL
1	National Senior Communities	Highland Springs	Dallas	TX	IL
3	ACTS Retirement-Life Communities, Inc. & Affiliates	Matthews Glen	Matthews	NC	IL
4	Presbyterian Homes & Services	Heartwood Care Center	Crosby	MN	NH
8	Lifespace Communities, Inc.	Oak Trace	Downers Grove	IL	IL
9	Trinity Health Senior Communities	Glacier Hills	Ann Arbor	MI	IL
28	Bethesda Senior Living Communities	LifeStream at Sun City	Sun City	AZ	IL
28	Bethesda Senior Living Communities	Bethesda Gardens at Thornton	Thornton	CO	AL
39	Lutheran Services Carolinas	Trinity Village IL	Hickory	NC	IL
50	Vivie fka KNWM (Knuke Nelson / Walker Methodist)	Timber Pines	Cambridge	MN	AL
88	The United Methodist Retirement Homes, Inc.	Croasdale Village	Durham	NC	IL
106	Moorings Park	Moorings Park Grande Lake	Naples	FL	IL

Note: Due to the high volume of expansions in 2024, the cut off was less than 20 total units. There were an additional 11 expansions in 2024.

Growth: New Communities

Historical Growth Of Largest 200 Systems



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

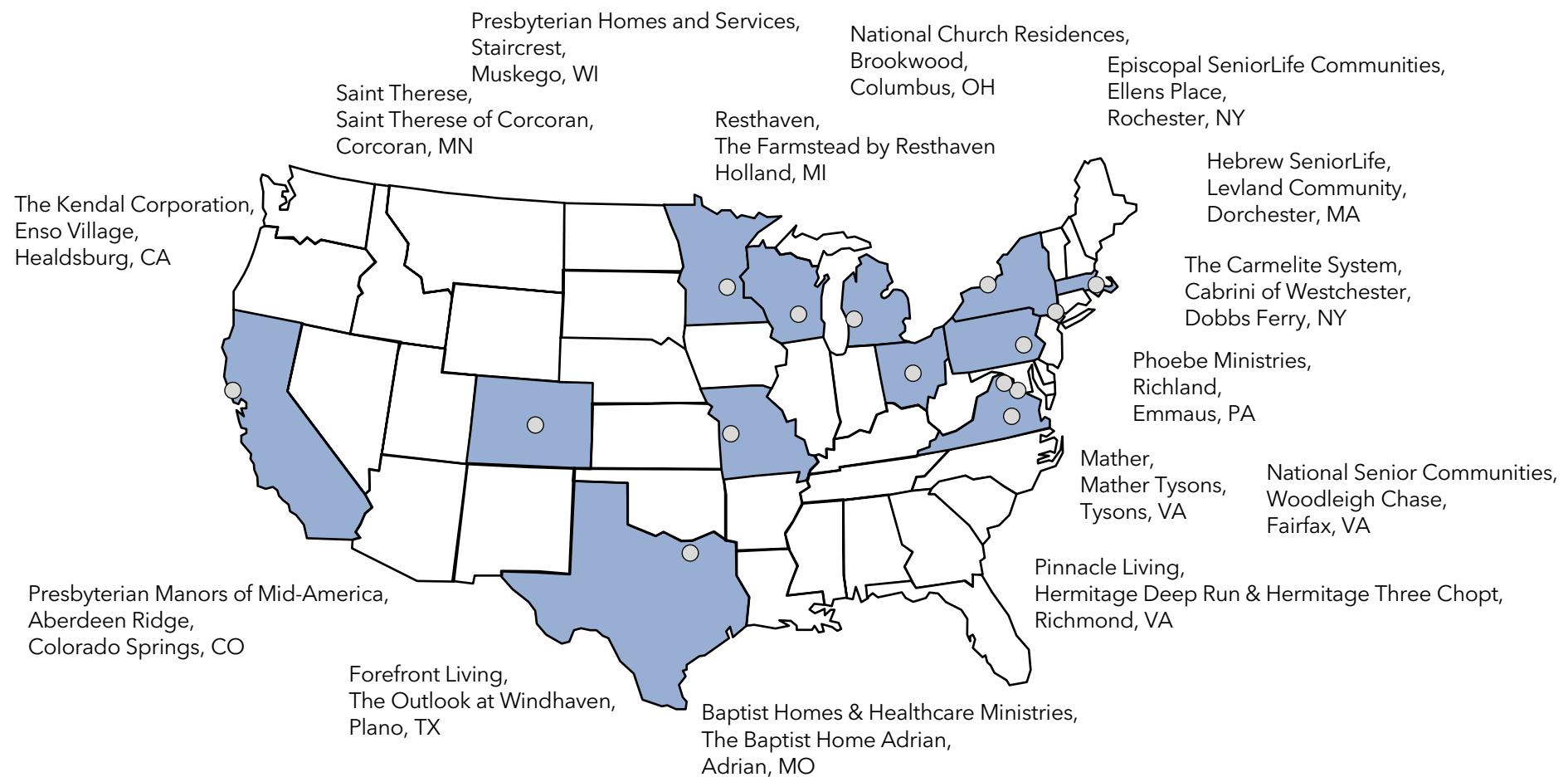
Growth: New Communities

2024 Community Openings

2025 Rank	System Name	Community	City	State	Community Type
1	National Senior Communities	Woodleigh Chase	Fairfax	VA	IL
4	Presbyterian Homes & Services	Staircrest	Muskego	WI	LPC
23	The Carmelite System	Caqbrini of Westchester	Dobbs Ferry	NY	NH
27	The Kendal Corporation	Enso Village	Healdsburg	CA	IL
29	Presbyterian Manors of Mid-America, Inc.	Aberdeen Ridge	Colorado Springs	CO	IL
31	National Church Residences	Brookwood	Columbus	OH	IL
53	Hebrew SeniorLife	Leyland Community	Dorchester	MA	IL
63	Phoebe Ministries	Richland	Emmaus	PA	IL
76	Mather	Mather Tysons	Tysons	VA	IL
85	Pinnacle Living	Hermitage Deep Run & Hermitage Three Chopt	Richmond	VA	AL
87	Saint Therese	Saint Therese of Corcoran	Corcoran	MN	LPC
113	Forefront Living	The Outlook at Windhaven	Plano	TX	LPC
126	Episcopal Seniorlife Communities	Ellens Place	Rochester	NY	IL
138	Baptist Homes & Healthcare Ministries	The Baptist Home Adrian	Adrian	MO	NH
179	Resthaven	The Farmstead by Resthaven	Holland	MI	LPC

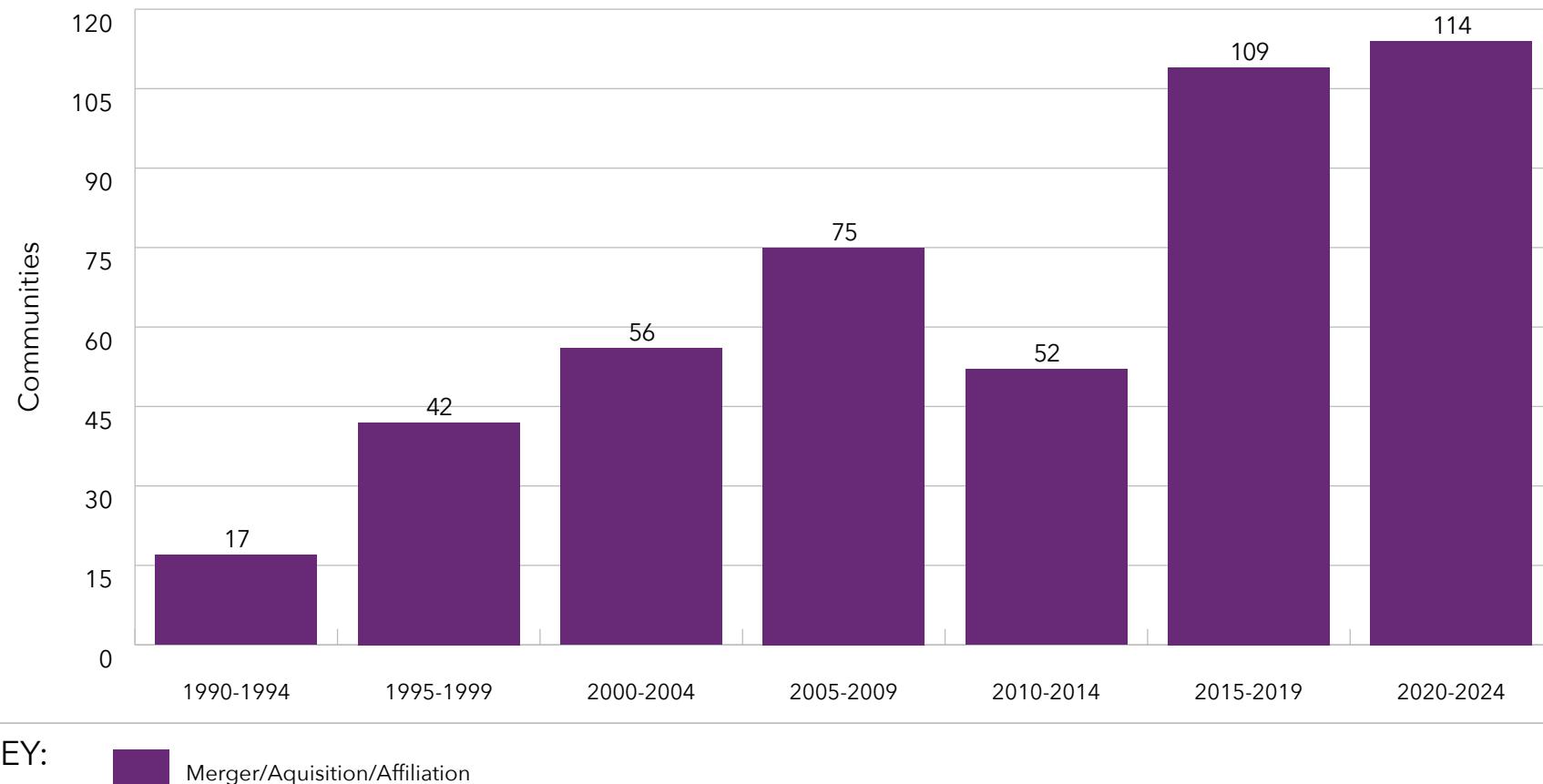
Growth: New Communities

2024 Locations



Growth: Mergers/Acquisitions/Affiliations

Historical Growth Of Largest 200 Systems



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

Growth: Mergers/Acquisitions/Affiliations

2024 Mergers/Acquisitions/Affiliations

2025 Rank	System Name	Community	City	State	Community Type
3	ACTS Retirement-Life Communities, Inc. & Affiliates	The Terraces at Bonita Springs	Bonita Springs	FL	LPC
6	HumanGood	Springhouse	Boston	MA	LPC
7	Covenant Living Communities and Services	Shannondale of Knoxville	Knoxville	TN	IL
7	Covenant Living Communities and Services	Shannondale of Maryville	Maryville	TN	LPC
14	EverTrue fka Lutheran Senior Services	EverTrue Buffalo Valley Lutheran Village	Lewisburg	PA	LPC
14	EverTrue fka Lutheran Senior Services	EverTrue Cumberland Crossings	Carlisle	PA	LPC
14	EverTrue fka Lutheran Senior Services	EverTrue Luther Crest	Allentown	PA	LPC
14	EverTrue fka Lutheran Senior Services	EverTrue Lutheran Home at Topton	Topton	PA	LPC
16	Concordia Lutheran Ministries	Concordia at Weatherwood	Greensburg	PA	AL
16	Concordia Lutheran Ministries	Concordia of Bridgeville	Bridgeville	PA	AL
17	Otterbein SeniorLife	Otterbein Tipp City	Tipp City	OH	LPC
17	Otterbein SeniorLife	Otterbein Green Hills	West Liberty	OH	LPC
19	Transforming Age	Carriage Oaks of St. Charles	St. Charles	IL	IL
19	Transforming Age	AlmaVia of Camarillo	Camarillo	CA	AL
19	Transforming Age	AlmaVia of San Francisco	San Francisco	CA	AL
19	Transforming Age	AlmaVia of San Rafael	San Rafael	CA	AL
19	Transforming Age	Mercy Retirement and Care Center	Oakland	CA	LPC
19	Transforming Age	The Villa at San Mateo	San Mateo	CA	IL
20	BHI Senior Living, Inc.	Westminster Village North	Indianapolis	IN	LPC
35	Buckner Retirement Services	The Stayton	Ft. Worth	TX	LPC
37	Kintura fka Brightspire and Well-Spring Group	The Village at Brookwood	Burlington	NC	IL
37	Kintura fka Brightspire and Well-Spring Group	Well-Spring Retirement Community	Greensboro	NC	IL
38	Masonicare	Masonicare at Greenridge Place	Rocky Hill	CT	AL
38	Masonicare	United Methodist Homes	Shelton	CT	LPC

Growth: Mergers/Acquisitions/Affiliations (Continued)

2024 Mergers/Acquisitions/Affiliations

2025 Rank	System Name	Community	City	State	Community Type
40	Eventide and Tabitha	Tabitha Senior Care	Lincoln	NE	LPC
47	United Church Homes, Inc.	Hamlet on Darby	Plain City	OH	IL
56	FellowshipLIFE, Inc.	Applewood Village	Freehold	NJ	LPC
59	Sun Health	Freedom Plaza	Peoria	AZ	LPC
61	EveryAge	Providence Place	High Point	NC	LPC
79	Garden Spot Communities	Frederick Living	Zieglerville	PA	LPC
87	Saint Therese	St. Mary of the Woods	Avon	OH	LPC
92	Tandem Living fka Mennonite Home Communities	Calvary Fellowship Homes	Lancaster	PA	LPC
99	Vista Prairie Communities	Vista Prairie at Red Cedar Canyon	Hudson	WI	AL
99	Vista Prairie Communities	Vista Prairie at Windmill Ponds	Alexandria	MN	AL
100	Christian Living Communities	Holly Creek	Centennial	CO	IL
104	Christian Health Care Center	Windmere	North Haledon	NJ	LPC
111	Wesley Willows	Highview in the Woodlands	Rockton	IL	AL
138	Baptist Homes & Healthcare Ministries	Tri-County	Vandalia	MO	LPC
143	Community First Solutions	The Patterson	Beavercreek	OH	AL
164	Redstone Presbyterian SeniorCare	Greensburg	Greensburg	PA	IL
173	Convivial Life, Inc.	Convivial Jacaranda Trace	Venice	FL	IL
180	Taylor Community	Taylor Meridith Bay	Meridith	NH	AL

Growth: Affiliations/Mergers/Acquisitions

2024 Locations

Vista Prairie Communities,
Vista Prairie at Windmill Ponds,
Alexandria, MN

Vista Prairie Communities,
Vista Prairie at Red Cedar Canyon,
Hudson, WI

Eventide,
Tabitha Care Center,
Lincoln, NE

California:
Transforming Age:
AlmaVia of Camarillo
AlmaVia of San Francisco
AlmaVia of San Rafael
The Villa of San Mateo
Mercy Retirement & Care Center, Oakland

Sun Health,
Freedom Plaza, Peoria, AZ

Christian Living Communities,
Holly Creek, Centennial, CO

Buckner Retirement Services,
The Stayton, Ft. Worth, TX

Baptist Homes &
Healthcare Ministries,
Tri-County, Vandalia, MO

Ohio:
Otterbein SeniorLife, Otterbein Tipp City
Otterbein SeniorLife, Otterbein Green Hills, W. Liberty
United Church Homes, Hamlet on Darby, Plain City
Saint Therese, St. Mary of the Woods, Avon
Community First Solutions, The Patterson, Beavercreek

Wesley Willows,
Highview in the Woodlands, Rockton, IL

Transforming Age,
Carriage Oaks, St. Charles, IL

BHI Senior Living,
Westminster Village North,
Indianapolis, IN

Pennsylvania:
*EverTrue, Luther Crest, Allentown
EverTrue, Buffalo Valley Lutheran Village, Lewisburg
EverTrue Cumberland Crossing, Carlisle
EverTrue, Lutheran Home, Topton
Concordia Lutheran Ministries, Concordia Weatherwood, Greensburg
Concordia Lutheran Ministries, Concordia Bridgeville
Garden Spot Village, Frederick Living, Zieglererville
Tandem Living, Calvary Fellowship Homes, Lancaster
Redstone Presbyterian SeniorCare, Greensburg

Taylor Community,
Taylor Meredith Bay, Meridith, NH

HumanGood,
Springhouse, Boston, MA

Masonicare:
Greenridge Place, Rocky Hill, CT
United Methodist Homes, Shelton, CT

New Jersey:
FellowshipLIFE, Applewood Village, Freehold
Christian Health Care Center, Windmere, N. Haledon

Kintura fka Brightspire & Well-Spring Group,
The Village at Brookwood, Burlington, NC
Well-Spring Retirement Community, Greensboro, NC

EveryAge, Providence Plance, High Point, NC

Covenant Living Communities,
Shannondale of Knoxville, TN
Shannondale of Maryville, TN

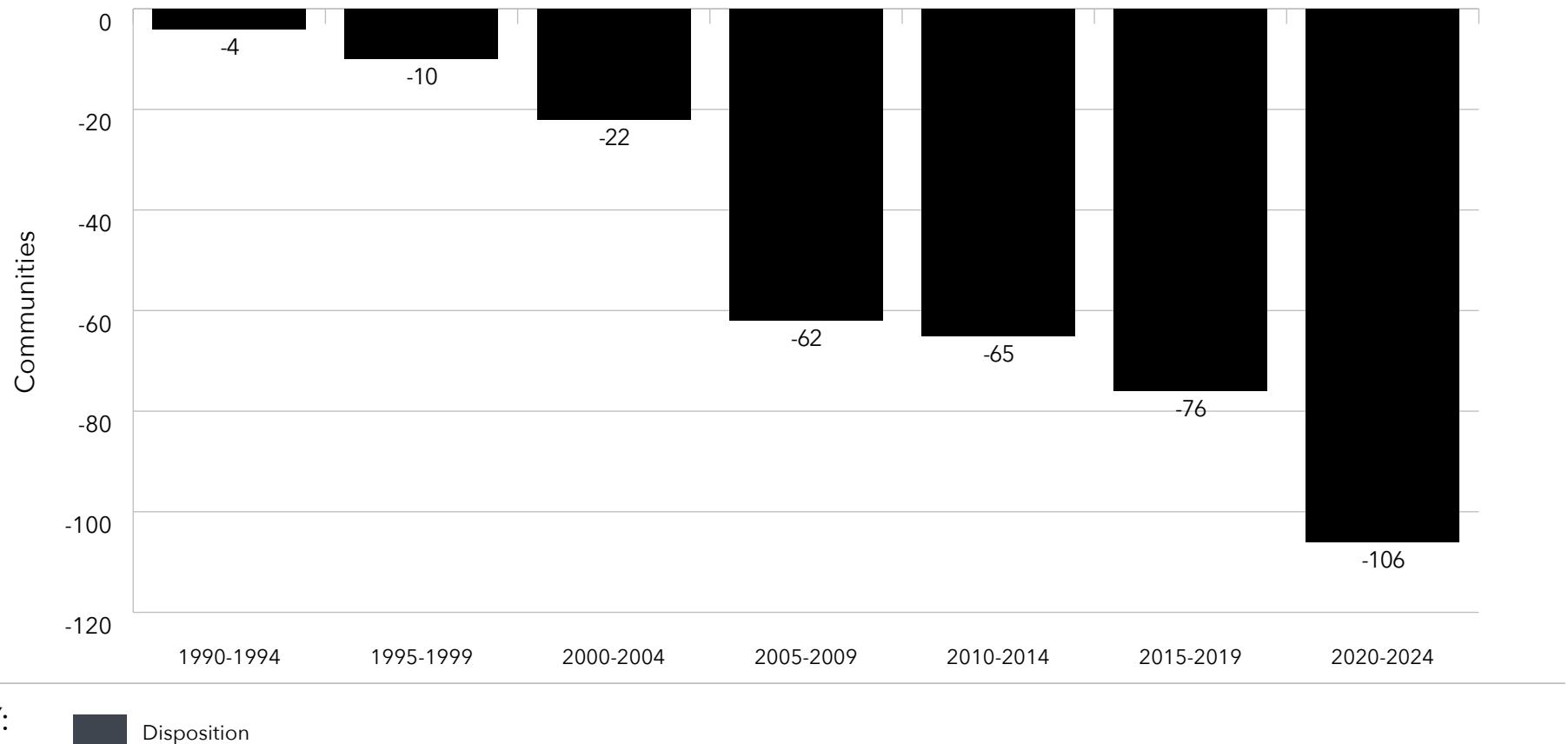
Convivial Life,
Convivial Jacaranda Trace, Venice, FL

Acts Retirement-Life Communities,
The Terraces, Bonita Springs, FL

*EverTrue fka Lutheran Senior Services

Growth: Dispositions

Historical Growth Of Largest 200 Systems



KEY:  Disposition

Disposition: The sale or closure of a community.

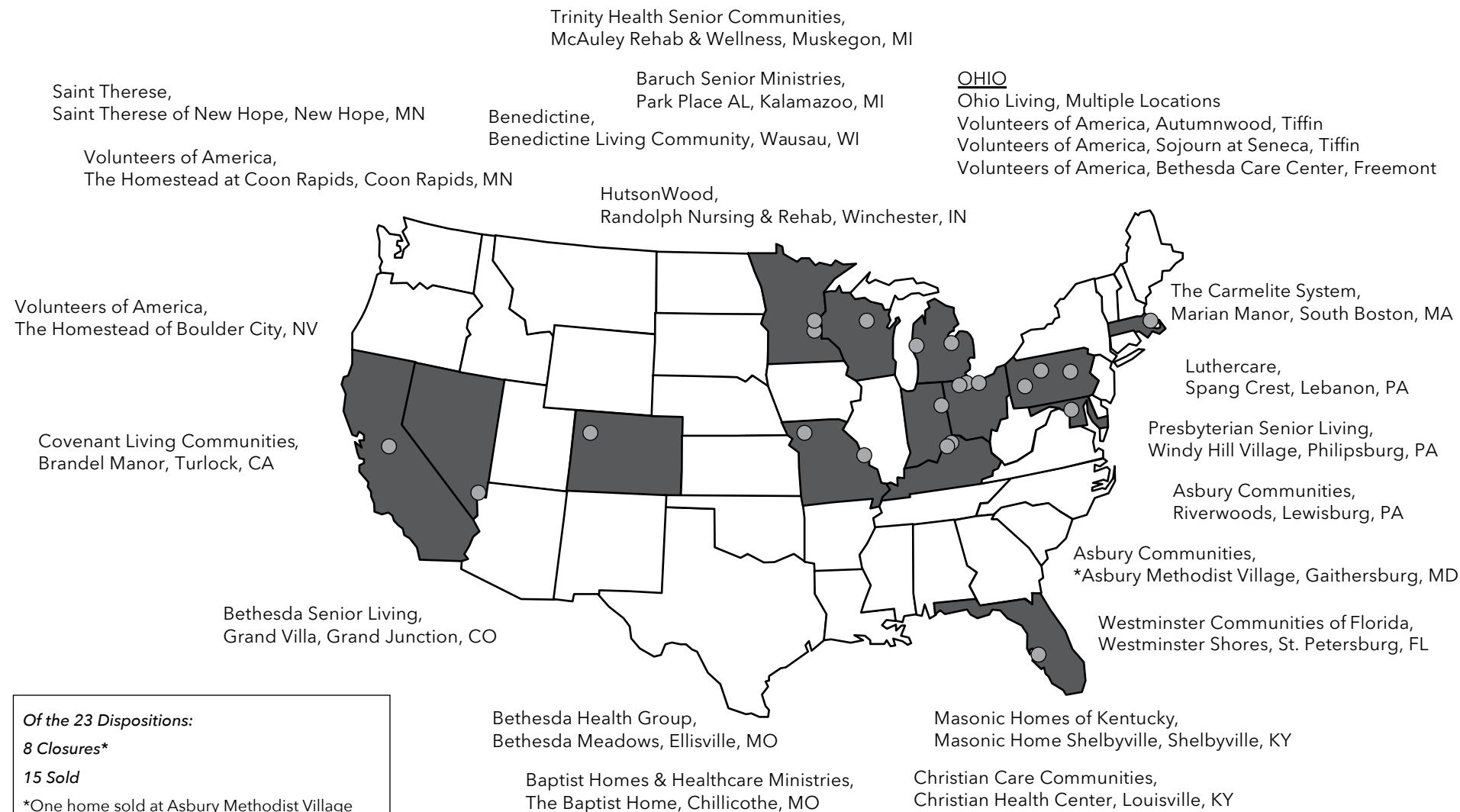
Growth: Dispositions

2024 Community Closures or Dispositions

2025 Rank	System Name	Community	City	State	Community Type
7	Covenant Living Communities and Services	Brandel Manor	Turlock	CA	NH
9	Trinity Health Senior Communities	McAuley Rehabilitation and Wellness	Muskegon	MI	NH
10	Benedictine	Benedictine Living Community - Wausau	Wausau	WI	NH
13	Westminster Retirement Communities of Florida	Westminster Shores	St. Petersburg	FL	AL
18	Presbyterian Senior Living	Windy Hill Village	Philipsburg	PA	LPC
21	Asbury Communities, Inc.	Asbury Methodist Village	Gaithersburg	MD	IL
21	Asbury Communities, Inc.	Riverwoods	Lewisburg	PA	NH
23	The Carmelite System	Marian Manor	South Boston	MA	NH
26	Ohio Living Communities	Multiple	Multiple	OH	NH
28	Bethesda Senior Living Communities	Grand Villa	Grand Junction	CO	AL
30	Volunteers of America	Autumnwood Care Center	Tiffin	OH	NH
30	Volunteers of America	Bethesda Care Center	Freemont	OH	NH
30	Volunteers of America	Soujourn at Seneca/Tiffin Care Ctr	Tiffin	OH	NH
30	Volunteers of America	The Homestead at Coon Rapids	Coon Rapids	MN	AL
30	Volunteers of America	The Homestead of Boulder City	Boulder City	NV	NH
52	Bethesda Health Group, Inc.	Bethesda Meadows	Ellisville	MO	NH
82	Baruch Senior Ministries	Park Place Assisted Living	Kalamazoo	MI	AL
87	Saint Therese	Saint Therese of New Hope	New Hope	MN	LPC
132	Masonic Homes of Kentucky	Masonic Homes Shelbyville	Shelbyville	KY	LPC
133	Christian Care Communities	Christian Health Center	Louisville	KY	NH
138	Baptist Homes & Healthcare Ministries	The Baptist Home Chillicothe	Chillicothe	MO	AL
139	LutherCare	Spang Crest	Lebanon	PA	NH
200	HutsonWood	Randolph Nursing and Rehab	Winchester	IN	NH

Growth: Dispositions

2024 Locations



Chapter 6

Additional Listings

Additional listings were added to LZ 200 with its inaugural publication: single-campus senior living and largest individual campuses. These lists are composed of LeadingAge members that fit within these specific categories. Like the rest of the LZ 200, these are quantitative, not qualitative, listings. It should be noted that with the 2024 LZ 200, the single-campus senior living listings were increased from the largest 150 to the largest 200.

Single-Campus Senior Living Communities

A single-campus senior living community offers care at one location, or campus (Chart 6-1a). The single-campus communities are ranked by number of units. The single-campus organizations listed in Chapter 6.1a-i are not part of a system but are single-site organizations. The single-campus listing stops at the 200th largest not-for-profit campus leaving some just beyond the list's cut off. The Over 200 is tracked by Ziegler and sorted alphabetically and determined by size (6-1b). These organizations may offer additional services, such as home-based care in the greater community, but oversee only one facility-based operation. A clear majority of these organizations are Life Plan Communities.

Chart 6-1c shows a small percentage (11%) of single-site campuses offer affordable housing. Chart 6-1d-e shows that 38% of these organizations offer some type of home-based care, either to residents or to individuals in the greater community.

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

Two new charts added in the 2023 LZ 200 is 6-1h-i that shows future growth of single-site communities wherein 58% plan to expand or reposition in 2025 or 2026, while 8% plan to grow their community either through affiliation or new development (a 2nd campus or satellite campus).

Largest Individual Campuses

Added back into the publication in 2019 is a listing of the largest 200 not-for-profit campuses in the country, regardless of whether they are a single-campus community or part of a multi-site organization within the LZ 200 (Chart 6-1j). The largest campus, Riderwood Village (MD), has a total of 2,128 market-rate units.



Additional Listings: Single-Campus Senior Living Communities

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

2025 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
1	Shell Point Retirement Community	Fort Myers	FL	1,870	1,334	356	180	71.3%	19.0%	9.6%
2	Charlestown	Catonsville	MD	1,688	1,377	208	103	81.6%	12.3%	6.1%
3	John Knox Village	Lee's Summit	MO	1,315	1,011	182	122	76.9%	13.8%	9.3%
4	Cross Keys Village - The Brethren Home Community	New Oxford	PA	983	590	123	270	60.0%	12.5%	27.5%
5	Panorama	Lacey	WA	969	784	45	140	80.9%	4.6%	14.4%
6	John Knox Village of Florida	Pompano Beach	FL	932	674	64	194	72.3%	6.9%	20.8%
7	Westminster Canterbury Richmond	Richmond	VA	919	599	162	158	65.2%	17.6%	17.2%
8	Brethren Village	Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%
9	Charles E. Smith Life Communities	Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
10	Friendship Village of Tempe	Tempe	AZ	770	551	91	128	71.6%	11.8%	16.6%
11	John Knox Village of Central Florida Inc	Orange City	FL	750	551	49	150	73.5%	6.5%	20.0%
12	Fleet Landing	Atlantic Beach	FL	732	482	150	100	65.8%	20.5%	13.7%
13	Glencroft Center for Modern Aging	Glendale	AZ	729	391	178	160	53.6%	24.4%	21.9%
14	Lakeview Village, Inc.	Lenexa	KS	701	517	26	158	73.8%	3.7%	22.5%
15	Beatitudes Campus	Phoenix	AZ	687	494	121	72	71.9%	17.6%	10.5%
16	St. Camillus Health Center, Inc.	Wauwatosa	WI	682	433	199	50	63.5%	29.2%	7.3%
17	Royal Oaks	Sun City	AZ	674	502	172	0	74.5%	25.5%	0.0%
18	Atlantic Shores Retirement Community	Virginia Beach	VA	662	556	66	40	84.0%	10.0%	6.0%
19	Twin Lakes Community	Burlington	NC	646	474	68	104	73.4%	10.5%	16.1%
20	Carolina Meadows	Chapel Hill	NC	640	476	78	86	74.4%	12.2%	13.4%
21	Army Residence Community	San Antonio	TX	639	450	98	91	70.4%	15.3%	14.2%
22	Waterman Village	Mount Dora	FL	639	418	101	120	65.4%	15.8%	18.8%
23	Tel Hai Retirement Community	Honey Brook	PA	625	406	100	119	65.0%	16.0%	19.0%
24	Mary's Woods at Marylhurst, Inc.	Lake Oswego	OR	624	477	147	0	76.4%	23.6%	0.0%
25	VMP	West Allis	WI	624	294	180	150	47.1%	28.8%	24.0%

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

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

2025 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	La Posada at Park Centre, Inc.	Green Valley	AZ	623	489	134	0	78.5%	21.5%	0.0%
27	Rolling Green Village	Greenville	SC	620	496	50	74	80.0%	8.1%	11.9%
28	Miami Jewish Health	Miami	FL	607	82	132	393	13.5%	21.7%	64.7%
29	Copeland Oaks	Sebring	OH	592	194	248	150	32.8%	41.9%	25.3%
30	Springmoor Life Care Retirement Community	Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
31	San Francisco Campus for Jewish Living	San Francisco	CA	580	0	202	378	0.0%	34.8%	65.2%
32	Cypress Cove at HealthPark Florida	Fort Myers	FL	577	425	88	64	73.7%	15.3%	11.1%
33	Westminster	Austin	TX	561	402	74	85	71.7%	13.2%	15.2%
34	Hebrew Home for the Aged Disabled	San Francisco	CA	552	0	190	362	0.0%	34.4%	65.6%
35	Masonic Care Community of New York	Utica	NY	551	151	80	320	27.4%	14.5%	58.1%
36	The Brothers of Mercy	Clarence	NY	547	211	96	240	38.6%	17.6%	43.9%
37	Casa de las Campanas	San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
38	The Philadelphia Protestant Home	Philadelphia	PA	539	248	175	116	46.0%	32.5%	21.5%
39	Paradise Valley Estates	Fairfield	CA	529	391	78	60	73.9%	14.7%	11.3%
40	Aldersgate	Charlotte	NC	525	300	105	120	57.1%	20.0%	22.9%
41	The Lutheran Home	Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
42	The Advent Christian Village	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
43	Londonderry Village	Palmyra	PA	509	382	38	89	75.0%	7.5%	17.5%
44	Manor Park Inc.	Midland	TX	508	322	114	72	63.4%	22.4%	14.2%
45	CC Young	Dallas	TX	508	223	160	125	43.9%	31.5%	24.6%
46	Bridgewater Retirement Community	Bridgewater	VA	505	280	98	127	55.4%	19.4%	25.1%
47	Deerfield Episcopal Retirement Community, Inc.	Asheville	NC	502	378	62	62	75.3%	12.4%	12.4%
48	Jewish Home fka Jewish Senior Life	Rochester	NY	496	90	78	328	18.1%	15.7%	66.1%
49	Carolina Village Inc	Hendersonville	NC	494	376	60	58	76.1%	12.1%	11.7%
50	Bishop Gadsden Episcopal Retirement Community	Charleston	SC	494	283	111	100	57.3%	22.5%	20.2%

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

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

2025 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	The Estates at Carpenters	Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%
52	Riddle Village	Media,	PA	493	358	49	86	72.6%	9.9%	17.4%
53	Mennonite Home of Albany, Inc.	Albany	OR	484	318	124	42	65.7%	25.6%	8.7%
54	Lenbrook	Atlanta	GA	481	403	18	60	83.8%	3.7%	12.5%
55	Sinai Residences of Boca Raton	Boca Raton	FL	480	345	75	60	71.9%	15.6%	12.5%
56	Montereau	Tulsa	OK	478	331	73	74	69.2%	15.3%	15.5%
57	Toby & Leon Cooperman Sinai Residences of Boca Raton	Boca Raton	FL	477	345	72	60	72.3%	15.1%	12.6%
58	Falcons Landing	Potomac Falls	VA	476	327	89	60	68.7%	18.7%	12.6%
59	The Forum at Rancho San Antonio	Cupertino	CA	474	342	84	48	72.2%	17.7%	10.1%
60	Compass Park	Franklin	IN	473	171	135	167	36.2%	28.5%	35.3%
61	Vicar's Landing (Life Care Pastoral Services, Inc.)	Ponte Vedra Beach	FL	471	373	38	60	79.2%	8.1%	12.7%
62	The Glenridge on Palmer Ranch	Sarasota	FL	470	363	48	59	77.2%	10.2%	12.6%
63	Wesleyan Homes Inc.	Georgetown	TX	469	243	84	142	51.8%	17.9%	30.3%
64	Cornwall Manor	Cornwall	PA	468	336	36	96	71.8%	7.7%	20.5%
65	Virginia Mennonite Retirement Community	Harrisonburg	VA	468	266	82	120	56.8%	17.5%	25.6%
66	Dunwoody Village	Newtown Square	PA	467	305	81	81	65.3%	17.3%	17.3%
67	Arbor Acres United Methodist Retirement Community, Inc.	Winston Salem	NC	467	289	95	83	61.9%	20.3%	17.8%
68	Epworth Villa	Oklahoma City	OK	464	263	114	87	56.7%	24.6%	18.8%
69	O'Connor Woods	Stockton	CA	461	245	116	100	53.1%	25.2%	21.7%
70	Homestead Village, Inc.	Lancaster	PA	460	374	26	60	81.3%	5.7%	13.0%
71	Providence Point	Pittsburgh	PA	459	333	84	42	72.5%	18.3%	9.2%
72	Meadowood	Worcester	PA	458	340	61	57	74.2%	13.3%	12.4%
73	St. Mark Village	Palm Harbor	FL	458	253	128	77	55.2%	27.9%	16.8%
74	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
75	Mercy Ridge	Timonium	MD	455	408	47	0	89.7%	10.3%	0.0%

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

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

2025 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	White Horse Village	Newtown Square	PA	454	331	48	75	72.9%	10.6%	16.5%
77	Orlando Senior Health Network	Orlando	FL	453	200	85	168	44.2%	18.8%	37.1%
78	Jeffrson's Ferry	South Setauket	NY	449	308	81	60	68.6%	18.0%	13.4%
79	Lutheran Jamestown	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
80	The Highlands at Wyomissing	Wyomissing	PA	445	302	63	80	67.9%	14.2%	18.0%
81	St. Paul Homes	Greenville	PA	442	106	144	192	24.0%	32.6%	43.4%
82	Terwilliger Plaza	Portland	OR	437	373	64	0	85.4%	14.6%	0.0%
83	Good Samaritan Home of Quincy	Quincy	IL	437	180	54	203	41.2%	12.4%	46.5%
84	Fellowship Community	Whitehall	PA	437	151	165	121	34.6%	37.8%	27.7%
85	North Hill Communities, Inc.	Needham	MA	436	320	44	72	73.4%	10.1%	16.5%
86	Horizon House	Seattle	WA	435	345	90	0	79.3%	20.7%	0.0%
87	Carol Woods	Chapel Hill	NC	434	315	89	30	72.6%	20.5%	6.9%
88	Greenwood Village South	Greenwood	IN	433	254	42	137	58.7%	9.7%	31.6%
89	Marquette	Indianapolis	IN	432	306	69	57	70.8%	16.0%	13.2%
90	Masonic Village at Burlington	Burlington	NJ	430	233	77	120	54.2%	17.9%	27.9%
91	The Trezevant Episcopal Home	Memphis	TN	428	220	104	104	51.4%	24.3%	24.3%
92	Canterbury Court	Atlanta	GA	426	319	63	44	74.9%	14.8%	10.3%
93	Seabury	Bloomfield	CT	425	244	109	72	57.4%	25.6%	16.9%
94	Pennswood Village	Newtown	PA	421	331	37	53	78.6%	8.8%	12.6%
95	Westminster Canterbury of Lynchburg, Inc.	Lynchburg	VA	421	262	159	0	62.2%	37.8%	0.0%
96	Mt. San Antonio Gardens	Pomona	CA	418	281	91	46	67.2%	21.8%	11.0%
97	Edenwald	Towson	MD	418	254	94	70	60.8%	22.5%	16.7%
98	Peter Becker Community	Harleysville	PA	417	305	40	72	73.1%	9.6%	17.3%
99	Shenandoah Valley Westminster-Canterbury	Winchester	VA	412	301	60	51	73.1%	14.6%	12.4%
100	The Mayflower Retirement Center, Inc.	Winter Park	FL	411	296	55	60	72.0%	13.4%	14.6%

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

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

2025 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
101	Laurel Lake Retirement Community, Inc.	Hudson	OH	411	275	61	75	66.9%	14.8%	18.2%
102	Bay Village of Sarasota, Inc.	Sarasota	FL	409	278	36	95	68.0%	8.8%	23.2%
103	Quarryville Presbyterian Retirement Community	Quarryville	PA	409	230	69	110	56.2%	16.9%	26.9%
104	Southminster, Inc.	Charlotte	NC	407	322	25	60	79.1%	6.1%	14.7%
105	Friendship Village of Dublin	Dublin	OH	406	301	55	50	74.1%	13.5%	12.3%
106	Oak Hammock at the University of Florida	Gainesville	FL	406	269	64	73	66.3%	15.8%	18.0%
107	Westminster Village	Bloomington	IL	405	237	72	96	58.5%	17.8%	23.7%
108	Plymouth Place	La Grange Park	IL	403	240	78	85	59.6%	19.4%	21.1%
109	Broadmead, Inc.	Cockeysville	MD	402	300	40	62	74.6%	10.0%	15.4%
110	Capital Manor	Salem	OR	402	295	107	0	73.4%	26.6%	0.0%
111	Lutheran Social Ministries at Crane's Mill, Inc.	West Caldwell	NJ	400	274	70	56	68.5%	17.5%	14.0%
112	Peconic Landing	Greenport	NY	398	296	42	60	74.4%	10.6%	15.1%
113	EdenHill Communities	New Braunfels	TX	398	147	64	187	36.9%	16.1%	47.0%
114	The Pines at Davidson, Inc.	Davidson, NC	NC	397	292	30	75	73.6%	7.6%	18.9%
115	Galloway Ridge	Pittsboro	NC	396	300	56	40	75.8%	14.1%	10.1%
116	Frasier	Boulder	CO	395	303	38	54	76.7%	9.6%	13.7%
117	Pennybyrn	High Point	NC	395	222	48	125	56.2%	12.2%	31.6%
118	Brandermill Woods Retirement Community	Midlothian	VA	394	275	59	60	69.8%	15.0%	15.2%
119	Willamette View Inc.	Portland	OR	393	300	87	6	76.3%	22.1%	1.5%
120	SC Episcopal Retirement Community at Still Hopes	West Columbia	SC	393	275	48	70	70.0%	12.2%	17.8%
121	Foulkeways at Gwynedd	Gwynedd	PA	393	258	89	46	65.6%	22.6%	11.7%
122	Dallas Retirement Village	Dallas	OR	393	187	85	121	47.6%	21.6%	30.8%
123	Kahala Senior Living Community, Inc.	Honolulu	HI	392	270	62	60	68.9%	15.8%	15.3%
124	Westminster Canterbury of the Blue Ridge	Charlottesville	VA	390	281	57	52	72.1%	14.6%	13.3%
125	The Sharon at SouthPark fka Sharon Towers	Charlotte	NC	389	253	40	96	65.0%	10.3%	24.7%

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

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

2025 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
126	Williamsburg Landing	Williamsburg	VA	389	222	109	58	57.1%	28.0%	14.9%
127	Salemtowne	Winston Salem	NC	387	221	66	100	57.1%	17.1%	25.8%
128	The Hill at Whitemarsh	Lafayette Hill	PA	382	294	28	60	77.0%	7.3%	15.7%
129	The Osborn	RYE	NY	382	203	95	84	53.1%	24.9%	22.0%
130	Warm Hearth Village	Blacksburg	VA	380	170	150	60	44.7%	39.5%	15.8%
131	Butterfield Trail Village	Fayetteville	AR	376	277	12	87	73.7%	3.2%	23.1%
132	Meth-Wick Community	Cedar Rapids	IA	376	248	62	66	66.0%	16.5%	17.6%
133	Heritage Community of Kalamazoo	Kalamazoo	MI	373	145	138	90	38.9%	37.0%	24.1%
134	Friendship Village of Kalamazoo	Kalamazoo	MI	372	232	83	57	62.4%	22.3%	15.3%
135	Saint John's Communities, Inc.	Milwaukee	WI	371	296	50	25	79.8%	13.5%	6.7%
136	Hillcrest	La Verne	CA	370	239	72	59	64.6%	19.5%	15.9%
137	St. James Place of Baton Rouge fka St. James Place	Baton Rouge	LA	370	215	66	89	58.1%	17.8%	24.1%
138	Casa Dorinda	Montecito	CA	368	278	90	0	75.5%	24.5%	0.0%
139	The Meth-Wick Community Inc.	Cedar Rapids	IA	368	247	55	66	67.1%	14.9%	17.9%
140	Tabor Hills	Naperville	IL	368	104	95	169	28.3%	25.8%	45.9%
141	Peabody Retirement Community	North Manchester	IN	367	57	118	192	15.5%	32.2%	52.3%
142	Brewster Place	Topeka	KS	364	239	28	97	65.7%	7.7%	26.6%
143	Village On The Isle	Venice	FL	362	234	64	64	64.6%	17.7%	17.7%
144	Trinity Woods, Inc.	Tulsa	OK	360	212	64	84	58.9%	17.8%	23.3%
145	Meadowlark Hills	Manhattan	KS	359	187	38	134	52.1%	10.6%	37.3%
146	Ginger Cove	Annapolis	MD	358	232	126	0	64.8%	35.2%	0.0%
147	Penney Retirement Community	Green Cove Springs	FL	358	230	78	50	64.2%	21.8%	14.0%
148	Searstone Retirement Community	Cary	NC	357	318	14	25	89.1%	3.9%	7.0%
149	Snyder Village	Metamora	IL	353	204	65	84	57.8%	18.4%	23.8%
150	Friendsview Retirement Community	Newberg	OR	352	252	100	0	71.6%	28.4%	0.0%

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

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

2025 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
151	Covenant Woods	Mechanicsville	VA	352	230	60	62	65.3%	17.0%	17.6%
152	Brookhaven at Lexington	Lexington	MA	350	289	49	12	82.6%	14.0%	3.4%
153	Niagara Lutheran Health System; Greenfields Continuing Care Community	Lancaster	NY	349	92	97	160	26.4%	27.8%	45.8%
154	Wake Robin Corporation	shelburne	VT	348	250	41	57	71.8%	11.8%	16.4%
155	Elim Park Baptist Home	Cheshire	CT	347	257	0	90	74.1%	0.0%	25.9%
156	Fairmount Homes	Ephrata	PA	347	159	74	114	45.8%	21.3%	32.9%
157	Westerwood	Columbus	OH	346	191	80	75	55.2%	23.1%	21.7%
158	Heath Village	Hackettstown	NJ	345	160	77	108	46.4%	22.3%	31.3%
159	Lions Gate CCRC	Voorhees	NJ	344	164	70	110	47.7%	20.3%	32.0%
160	Piper Shores	Scarborough	ME	342	252	50	40	73.7%	14.6%	11.7%
161	Vinson Hall Retirement Community	McLean	VA	338	235	57	46	69.5%	16.9%	13.6%
162	Friendship Haven	Fort Dodge	IA	338	108	104	126	32.0%	30.8%	37.3%
163	Larksfield Place Retirement Communities, Inc	Wichita	KS	337	185	72	80	54.9%	21.4%	23.7%
164	The Redwoods - A Community of Seniors	Mill Valley	CA	336	148	130	58	44.0%	38.7%	17.3%
165	Burcham Hills	East Lansing	MI	336	44	159	133	13.1%	47.3%	39.6%
166	WhiteStone	Greensboro	NC	335	211	38	86	63.0%	11.3%	25.7%
167	St. Anne's Retirement Community	Columbia	PA	334	169	53	112	50.6%	15.9%	33.5%
168	The Village at Germantown, Inc.	Germantown	TN	333	230	48	55	69.1%	14.4%	16.5%
169	Sunnyside Village	Sarasota	FL	331	226	45	60	68.3%	13.6%	18.1%
170	Wesley Commons	Greenwood	SC	330	190	60	80	57.6%	18.2%	24.2%
171	Lutheran Homes of Oconomowoc	Oconomowoc	WI	329	141	74	114	42.9%	22.5%	34.7%
172	Beacon Hill at Eastgate	Grand Rapids	MI	328	216	83	29	65.9%	25.3%	8.8%
173	The Forest at Duke	Durham	NC	327	235	34	58	71.9%	10.4%	17.7%
174	Spanish Cove Retirement Village	Yukon	OK	327	215	55	57	65.7%	16.8%	17.4%
175	Plymouth Harbor, Inc	Sarasota	FL	326	215	60	51	66.0%	18.4%	15.6%

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

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

2025 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
176	Elm Terrace Gardens	Lansdale	PA	326	150	80	96	46.0%	24.5%	29.4%
177	Carlyle Place	Macon	GA	321	226	55	40	70.4%	17.1%	12.5%
178	Waverly Heights	Gladwyne	PA	318	219	68	31	68.9%	21.4%	9.7%
179	The Glen Retirement System	Shreveport	LA	316	60	130	126	19.0%	41.1%	39.9%
180	Carleton-Willard Homes, Inc.	Bedford	MA	313	157	56	100	50.2%	17.9%	31.9%
181	Pilgrim Place	Claremont	CA	312	185	68	59	59.3%	21.8%	18.9%
182	Hartsfield Village	Munster	IN	312	106	94	112	34.0%	30.1%	35.9%
183	Briarwood Retirement Community	Worcester	MA	311	181	48	82	58.2%	15.4%	26.4%
184	Sierra Winds	Peoria	AZ	310	240	0	70	77.4%	0.0%	22.6%
185	Woodland Pond Inc.	New Paltz	NY	307	207	60	40	67.4%	19.5%	13.0%
186	Atherton Baptist Homes	Alhambra	CA	306	208	98	0	68.0%	32.0%	0.0%
187	Foxdale Village	State College	PA	306	205	55	46	67.0%	18.0%	15.0%
188	Edgewood	North Andover	MA	303	243	0	60	80.2%	0.0%	19.8%
189	Roland Park Place, Inc.	Baltimore	MD	303	219	68	16	72.3%	22.4%	5.3%
190	Blakeford Senior Life fka Blakeford at Green Hills	Nashville	TN	303	173	47	83	57.1%	15.5%	27.4%
191	Wesley Towers, Inc.	Hutchinson	KS	302	178	72	52	58.9%	23.8%	17.2%
192	Aviva Senior Living	Sarasota	FL	300	185	70	45	61.7%	23.3%	15.0%
193	Legacy Pointe at UCF	Oviedo	FL	300	172	80	48	57.3%	26.7%	16.0%
194	Redstone Village	Huntsville	AL	300	148	96	56	49.3%	32.0%	18.7%
195	Brevillier Village	Erie	PA	300	95	120	85	31.7%	40.0%	28.3%
196	The Vineyards California Armenian Home	Fresno	CA	300	60	121	119	20.0%	40.3%	39.7%
197	Westminster Village, Inc.	Scottsdale	AZ	299	238	61	0	79.6%	20.4%	0.0%
198	RoseVilla fka Rose Villa	Portland	OR	294	262	16	16	89.1%	5.4%	5.4%
199	Spring Harbor at Green Island	Columbus	GA	294	196	58	40	66.7%	19.7%	13.6%
200	Immanuel Living fka Immanuel Lutheran Communities	Kalispell	MT	293	111	60	122	37.9%	20.5%	41.6%

Additional Listings: Single-Campus Senior Living Communities

The Over 200

The LZ 200 stops at the 200th largest single-site campus, leaving a number of senior living communities just beyond the list's cut-off. The Over 200 represents organizations ranked from 201-251

Over 200 (293 to 237 Total Units)

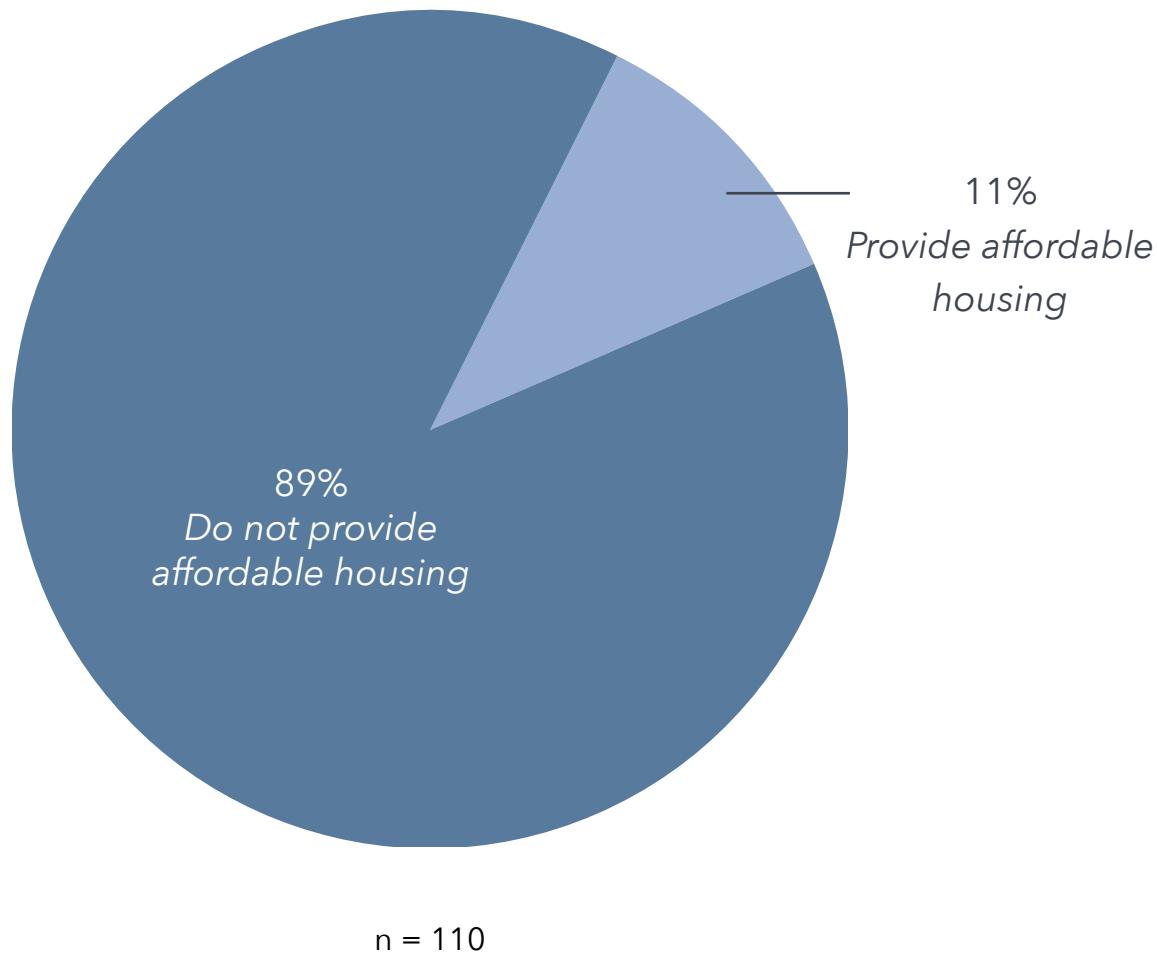
Bartels Lutheran Retirement Community (IA)
 Baywood Court (CA)
 Bishop Drumm Retirement Center (IA)
 Central Baptist Village (IL)
 Channing House (CA)
 Christwood (LA)
 Clark-Lindsey Village, Inc. (IL)
 Clement Manor (WI)
 Duncaster (CT)
 Fox Run at Orchard Park (NY)
 Friendship Manor (IL)
 Holy Cross Village at Notre Dame (IN)
 Josephine Caring Community (WA)
 Masonic Home of Virginia (VA)
 Penick Village (NC)
 Rappahannock Westminster-Canterbury (VA)
 Saint Mary's at Asbury Ridge (PA)
 St. Mary's Home for the Aged (WI)
 Stonehill Communities (IA)
 Swiss Village Inc. (IN)
 The Admiral at the Lake (IL)
 The Hearthstone (WA)
 The Oaks at Bartlett (IL)
 The Woodlands at Furman (SC)
 Warm Beach Senior Community (WA)

Over 200 (237 to 92 Total Units)

Aldersly (NC)
 Attic Angel Place (WI)
 Bayview (WA)
 Bethany Home (WI)
 Brethren Care Village (OH)
 Christian Care Retirement Community (IN)
 Evenglow Senior Living (IL)
 Fahrney Keedy Memorial Home (MD)
 Franke Tobey Jones (WA)
 Glenmeadow (MA)
 Good Shepherd Home (OH)
 Hollenbeck Palms (CA)
 Holly Hall Retirement Community (TX)
 Keswick Multi-care Center, Inc. (MD)
 Lambeth House (LA)
 Lasell Village (MA)
 Lourdes Senior Community (MI)
 Northcrest Community (IA)
 Northfield Retirement Communities (NE)
 Presbyterian Village Inc. (AR)
 Thurston Woods Village (MI)
 United Zion Retirement Community (PA)
 Webster at Rye (NH)
 Wesley Manor Retirement Community (KY)
 Westminster Towers (SC)

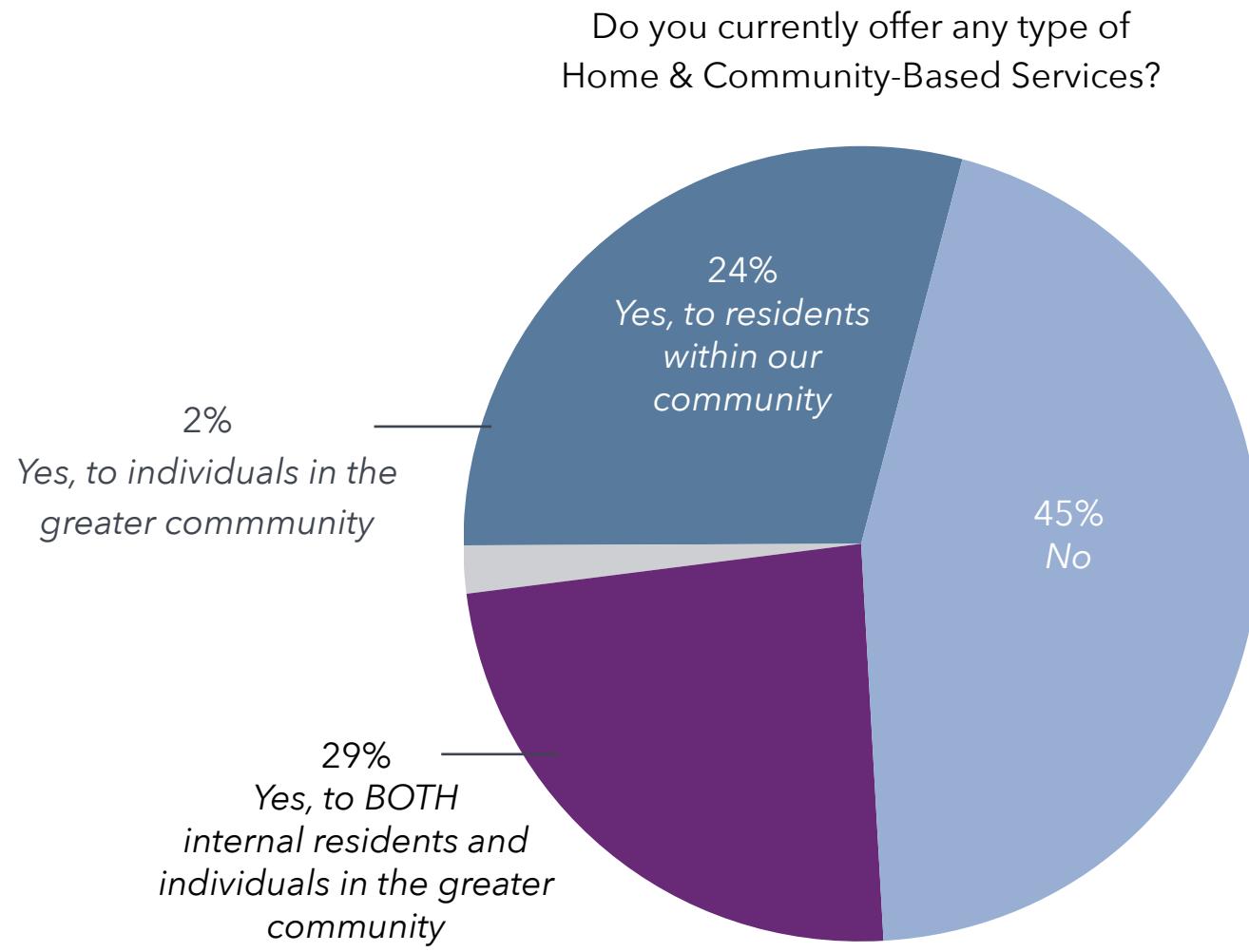
Additional Listings: The Largest 200 Single-Campus Senior Living Communities

Single-Campus Providers With Affordable Housing

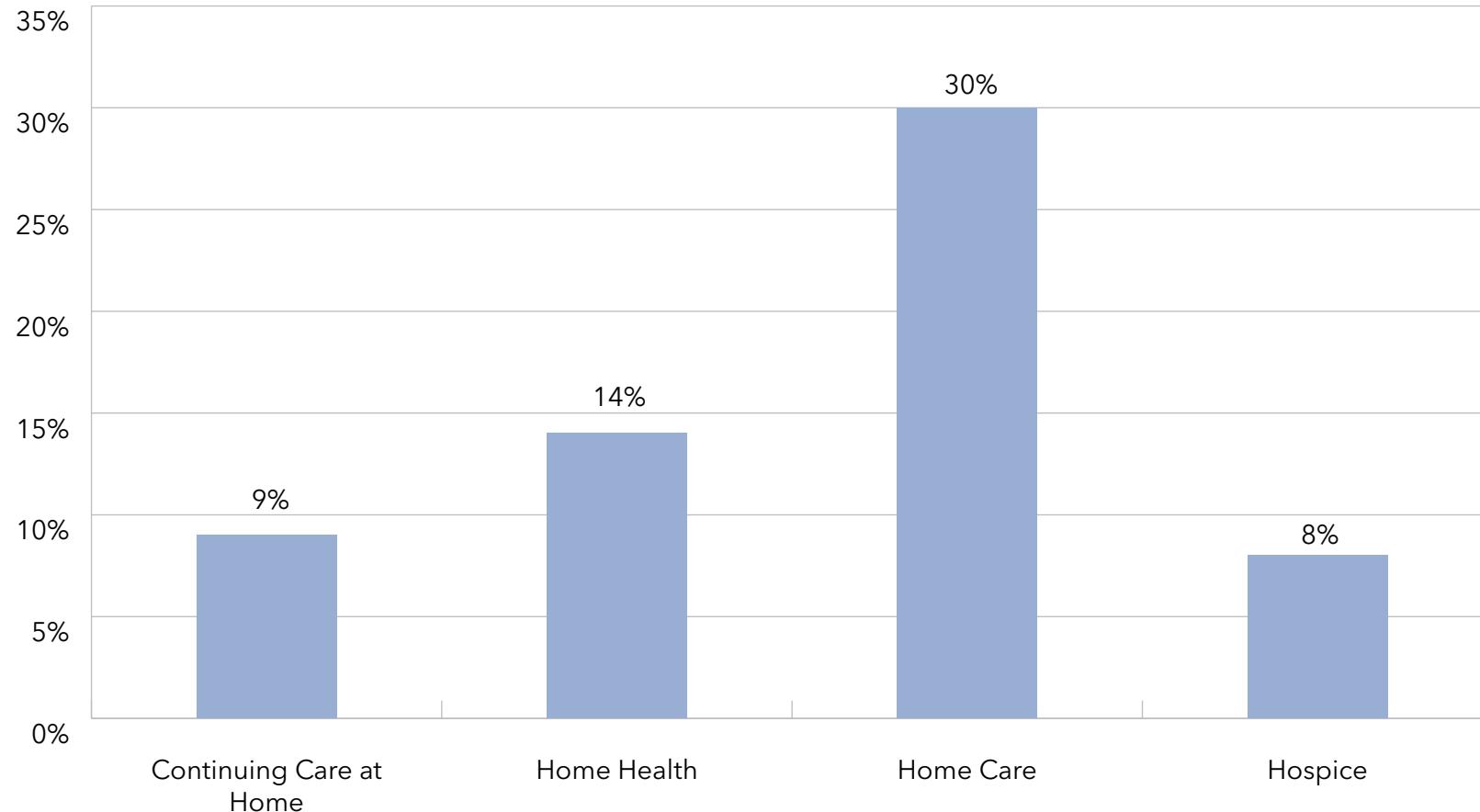


Additional Listings: The Largest 200 Single-Campus Senior Living Communities

Single-Campus Providers of HCBS



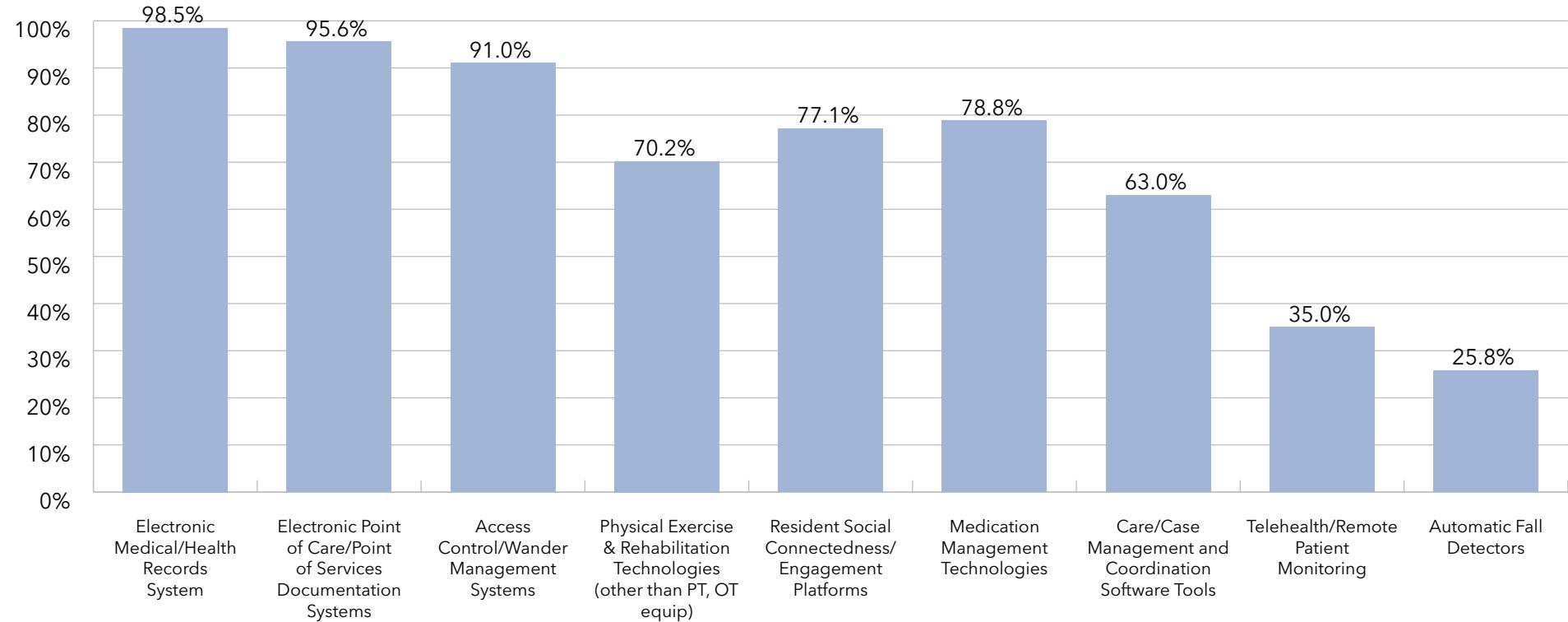
Additional Listings: The Largest 200 Single-Campus Senior Living Communities *Offering: Hospice, Home Care, Home Health & Continuing Care at Home*



n = 136

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

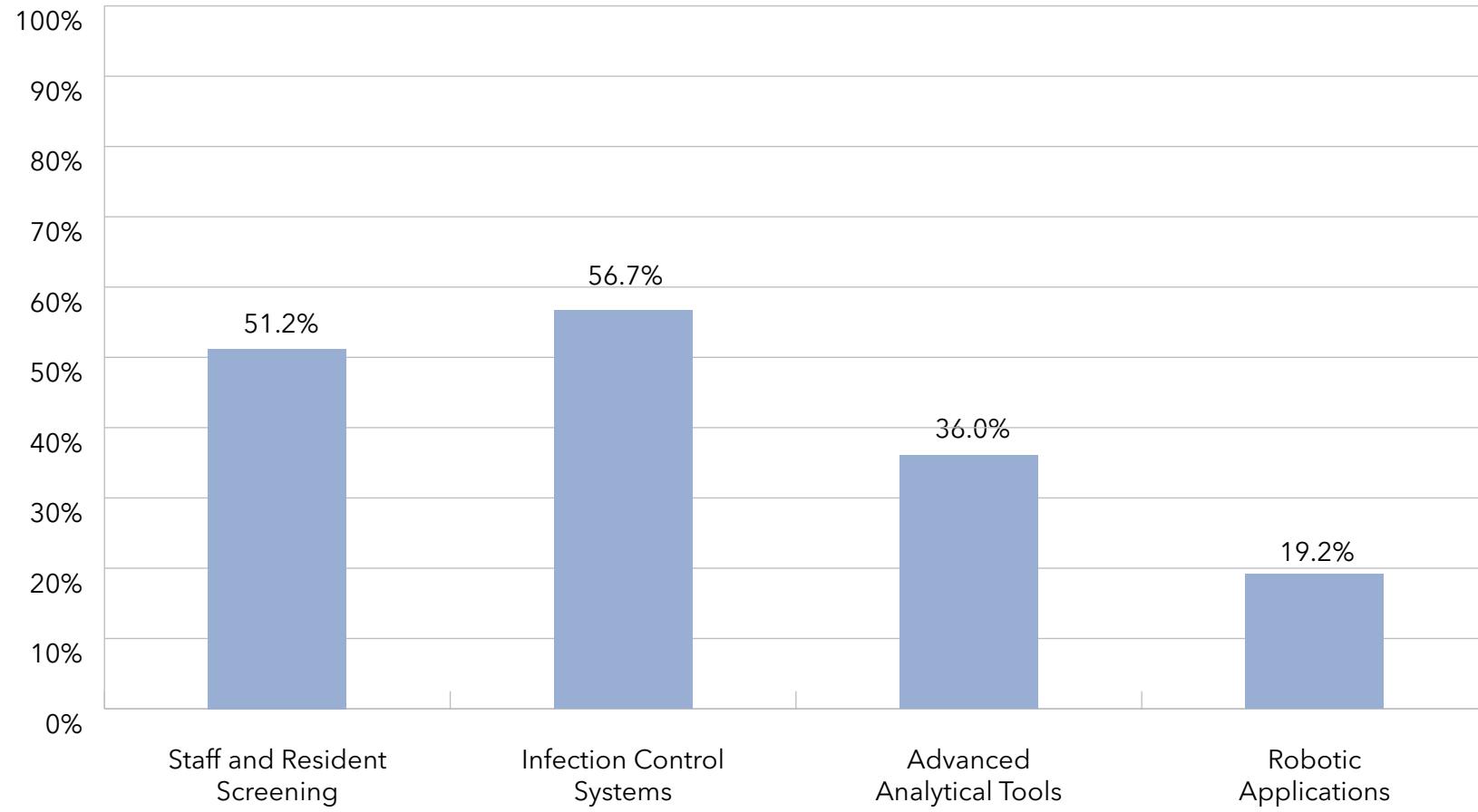
Technology Adoption: Single-Campus Providers



n = 130 (avg)

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

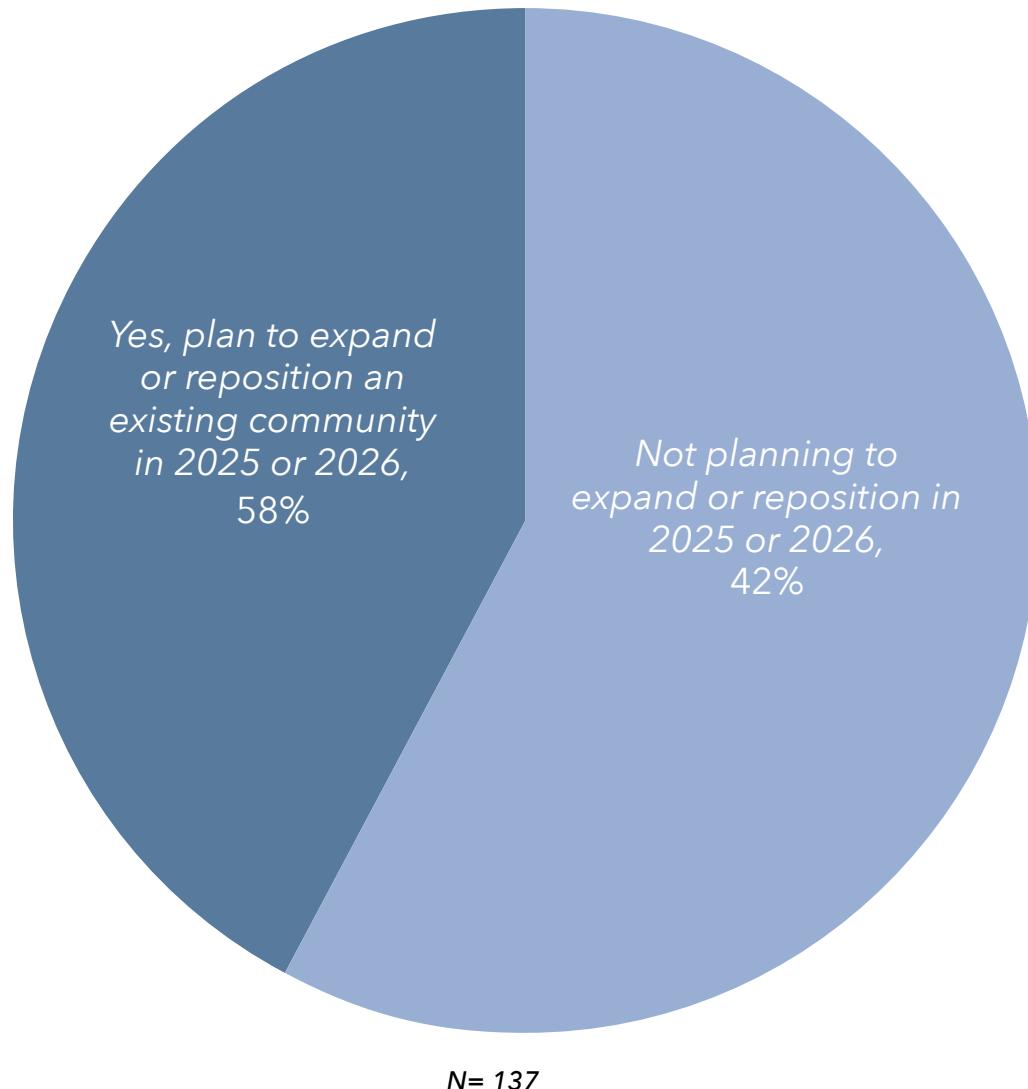
Technology Adoption: Single-Campus Providers



n = 126 (avg)

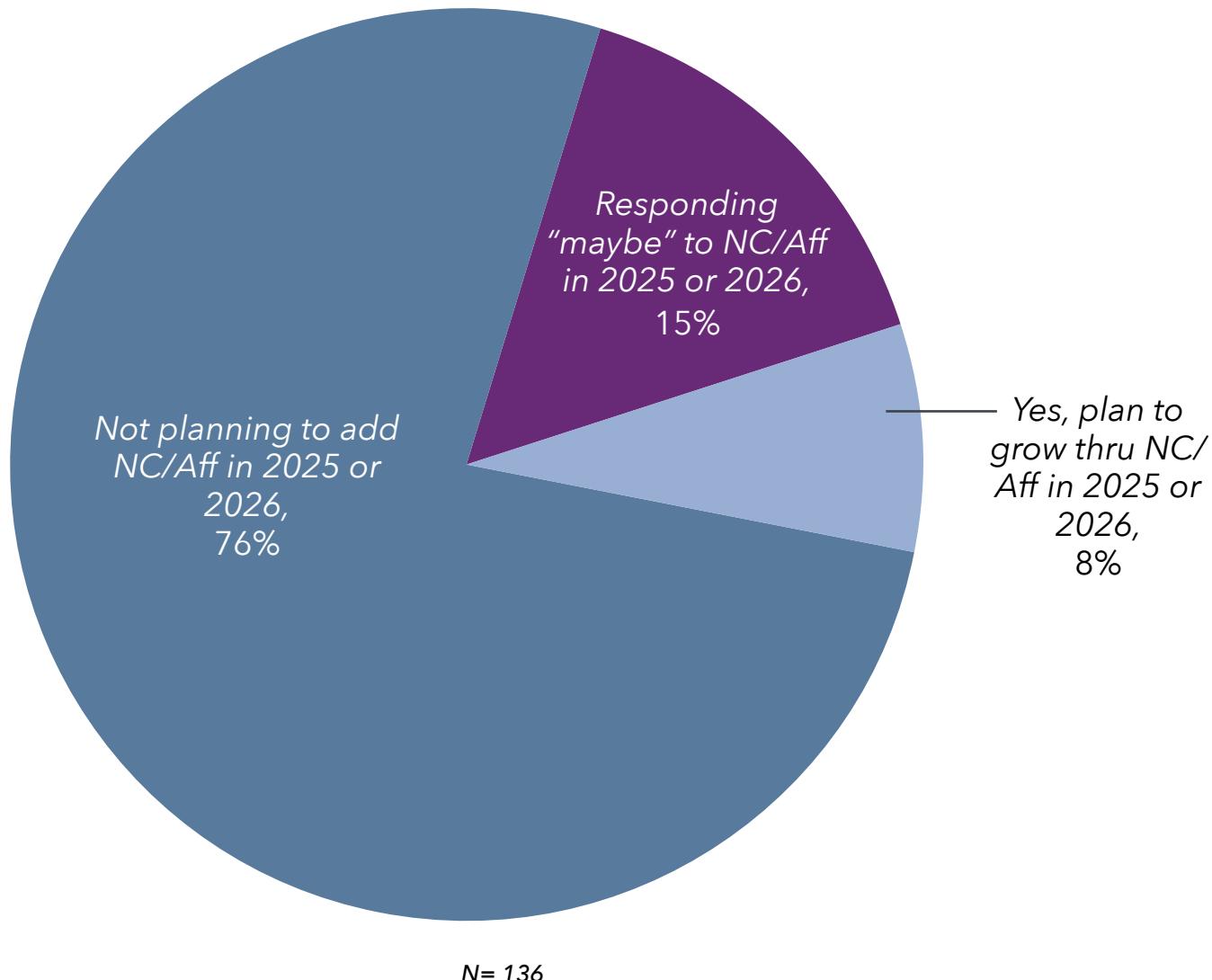
Additional Listings: The Largest 200 Single-Campus Senior Living Communities

Future Growth: Single-Campus Providers Planning to Expand or Reposition in Next Two Years



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

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



Additional Listings: Largest Individual Campuses

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

2025 Rank	2024 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
1	1	Riderwood Village	National Senior Communities	Silver Spring	MD	2,128	1,781	245	102	83.7%	11.5%	4.8%
2	2	Shell Point Retirement Community		Fort Myers	FL	1,870	1,334	356	180	71.3%	19.0%	9.6%
3	3	Oak Crest	National Senior Communities	Parkville	MD	1,821	1,494	175	152	82.0%	9.6%	8.3%
4	5	Greenspring Village	National Senior Communities	Springfield	VA	1,725	1,376	251	98	79.8%	14.6%	5.7%
5	4	Charlestown		Catonsville	MD	1,688	1,377	208	103	81.6%	12.3%	6.1%
6	6	Ann's Choice	National Senior Communities	Warminster	PA	1,667	1,465	126	76	87.9%	7.6%	4.6%
7	7	Cedar Crest	National Senior Communities	Pompton Plains	NJ	1,634	1,439	82	113	88.1%	5.0%	6.9%
8	8	Masonic Village at Elizabethtown	Masonic Villages of the Grand Lodge of Pennsylvania	Elizabethtown	PA	1,595	1,009	133	453	63.3%	8.3%	28.4%
9	9	Brooksby Village	National Senior Communities	Peabody	MA	1,578	1,339	153	86	84.9%	9.7%	5.4%
10	12	Ashby Ponds	National Senior Communities	Loudon	VA	1,484	1,341	99	44	90.4%	6.7%	3.0%
11	10	John Knox Village		Lee's Summit	MO	1,315	1,011	182	122	76.9%	13.8%	9.3%
12	16	Highland Springs	National Senior Communities	Dallas	TX	1,294	1,294	0	0	100.0%	0.0%	0.0%
13	11	Maris Grove	National Senior Communities	Glen Mills	PA	1,293	1,116	89	88	86.3%	6.9%	6.8%
14	13	Fox Run	National Senior Communities	Novi	MI	1,250	1,118	88	44	89.4%	7.0%	3.5%
15	15	Linden Ponds	National Senior Communities	Hingham	MA	1,222	1,086	70	66	88.9%	5.7%	5.4%
16	14	Seabrook Village	National Senior Communities	Tinton Falls	NJ	1,210	1,027	92	91	84.9%	7.6%	7.5%
17	17	Asbury Methodist Village	Asbury Communities	Gaithersburg	MD	1,127	809	133	185	71.8%	11.8%	16.4%
18	18	Willow Valley Lakes Manor	Willow Valley Communities	Lancaster	PA	1,007	750	138	119	74.5%	13.7%	11.8%
19	19	The Hebrew Home at Riverdale	RiverSpring Living	Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
20	20	Cross Keys Village - The Brethren Home Community		New Oxford	PA	983	590	123	270	60.0%	12.5%	27.5%
21	21	Eagle's Trace	National Senior Communities	Houston	TX	980	980	0	0	100.0%	0.0%	0.0%
22	22	Panorama		Lacey	WA	969	784	45	140	80.9%	4.6%	14.4%
23	23	John Knox Village of Florida		Pompano Beach	FL	932	674	64	194	72.3%	6.9%	20.8%
24	36	Westminster Canterbury Richmond		Richmond	VA	919	599	162	158	65.2%	17.6%	17.2%
25	24	Good Samaritan Society Kissimmee	The Evangelical Lutheran Good Samaritan Society	Kissimmee	FL	884	675	39	170	76.4%	4.4%	19.2%

Additional Listings: Largest Individual Campuses (continued)

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

2025 Rank	2024 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
26	25	Brethren Village		Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%
27	27	St. John's Homes & Meadows		Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
28	28	Rogue Valley Manor	Pacific Retirement Services	Medford	OR	806	605	97	104	75.1%	12.0%	12.9%
29	29	Greencroft Goshen	Greencroft Communities	Goshen	IN	805	439	126	240	54.5%	15.7%	29.8%
30	30	Garden Spot Village	Garden Spot Communities	New Holland	PA	799	621	105	73	77.7%	13.1%	9.1%
31	32	Heritage Pointe	Heritage Pointe Communities	Warren	IN	796	152	458	186	19.1%	57.5%	23.4%
32	50	Tallgrass Creek	National Senior Communities	Overland Park	KS	791	691	56	44	87.4%	7.1%	5.6%
33	33	Indian River Estates	Acts Retirement-Life Communities	Vero Beach	FL	783	603	60	120	77.0%	7.7%	15.3%
34	34	Charles E. Smith Life Communities		Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
35	35	Mennonite Home Communities	Tandem Living	Lancaster	PA	780	535	85	160	68.6%	10.9%	20.5%
36	52	Matthews Glen	Acts Retirement-Life Communities	Matthews	NC	774	594	100	80	76.7%	12.9%	10.3%
37	31	Friendship Village of Tempe		Tempe	AZ	770	551	91	128	71.6%	11.8%	16.6%
38	47	Otterbein Lebanon Retirement Community	Otterbein SeniorLife	Lebanon	OH	761	540	67	154	71.0%	8.8%	20.2%
39	37	The Wartburg Adult Care Community		Mount Vernon	NY	758	505	105	148	66.6%	13.9%	19.5%
40	38	John Knox Village of Central Florida Inc		Orange City	FL	750	551	49	150	73.5%	6.5%	20.0%
41	39	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	748	326	280	142	43.6%	37.4%	19.0%
42	41	Bethany Lutheran Village		Dayton	OH	739	383	109	247	51.8%	14.7%	33.4%
43	42	Willow Valley Manor North	Willow Valley Communities	Lancaster	PA	735	495	91	149	67.3%	12.4%	20.3%
44	44	Fleet Landing		Atlantic Beach	FL	732	482	150	100	65.8%	20.5%	13.7%
45	45	Glencroft Center for Modern Aging		Glendale	AZ	729	391	178	160	53.6%	24.4%	21.9%
46	46	Passavant Retirement Community	Lutheran SeniorLife	Zelienople	PA	729	256	214	259	35.1%	29.4%	35.5%
47	61	Croasdale Village	UMRH (United Methodist Retirement Homes)	Durham	NC	711	541	56	114	76.1%	7.9%	16.0%
48	48	Lakeview Village, Inc.		Lenexa	KS	701	517	26	158	73.8%	3.7%	22.5%
49	49	Landis Homes	Landis Communities	Lititz	PA	698	514	81	103	73.6%	11.6%	14.8%
50	51	MorseLife		West Palm Beach	FL	688	284	94	310	41.3%	13.7%	45.1%

Additional Listings: Largest Individual Campuses (continued)

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

2025 Rank	2024 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
51	53	Beatitude Campus		Phoenix	AZ	687	494	121	72	71.9%	17.6%	10.5%
52	54	St. Camillus Health Center, Inc.		Wauwatosa	WI	682	433	199	50	63.5%	29.2%	7.3%
53	55	Royal Oaks		Sun City	AZ	673	502	171	0	74.6%	25.4%	0.0%
54	43	Laclede Groves	EverTrue fka Lutheran Senior Services	Webster Groves	MO	673	358	126	189	53.2%	18.7%	28.1%
55	57	Augustana Care Minneapolis	Cassia	Minneapolis	MN	671	366	0	305	54.5%	0.0%	45.5%
56	58	Friendship Village Sunset Hills	Friendship Village of St. Louis	St. Louis	MO	668	448	76	144	67.1%	11.4%	21.6%
57	56	Atlantic Shores Retirement Community		Virginia Beach	VA	662	556	66	40	84.0%	10.0%	6.0%
58	59	St. Ann's Community	St. Ann's of Greater Rochester	Rochester	NY	662	120	120	422	18.1%	18.1%	63.7%
59	60	Concordia Village of Tampa	Concordia Lutheran Ministries	Tampa	FL	661	333	165	163	50.4%	25.0%	24.7%
60	80	Twin Lakes Community		Burlington	NC	646	474	68	104	73.4%	10.5%	16.1%
61	62	Carolina Meadows		Chapel Hill	NC	640	476	78	86	74.4%	12.2%	13.4%
62	63	Army Residence Community		San Antonio	TX	639	450	98	91	70.4%	15.3%	14.2%
63	64	Waterman Village		Mount Dora	FL	639	418	101	120	65.4%	15.8%	18.8%
64	65	Raybrook Manor	Holland Home	Grand Rapids	MI	638	299	238	101	46.9%	37.3%	15.8%
65	67	Westminster-Canterbury on Chesapeake Bay	Westminster-Canterbury on Chesapeake Bay	Virginia Beach	VA	634	446	80	108	70.3%	12.6%	17.0%
66	68	Loretto Brighton Campus	Loretto	Syracuse	NY	633	0	79	554	0.0%	12.5%	87.5%
67	66	Tel Hai Retirement Community		Honey Brook	PA	625	406	100	119	65.0%	16.0%	19.0%
68	70	Mary's Woods at Marylhurst, Inc.		Lake Oswego	OR	624	477	147	0	76.4%	23.6%	0.0%
69	71	VMP		West Allis	WI	624	294	180	150	47.1%	28.8%	24.0%
70	72	La Posada at Park Centre, Inc.		Green Valley	AZ	623	489	134	0	78.5%	21.5%	0.0%
71	74	Westminster Winter Park	Westminster Retirement Communities of Florida	Winter Park	FL	622	425	77	120	68.3%	12.4%	19.3%
72	73	Ingleside at King Farm	Ingleside	Rockville	MD	621	368	75	178	59.3%	12.1%	28.7%
73	69	Rolling Green Village		Greenville	SC	620	496	50	74	80.0%	8.1%	11.9%
74	75	Forefront Living	Forefront Living	Dallas	TX	616	365	145	106	59.3%	23.5%	17.2%
75	76	Fellowship Square-Tucson Campus	Christian Care Companies	Tucson	AZ	615	555	60	0	90.2%	9.8%	0.0%

Additional Listings: Largest Individual Campuses (continued)

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

2025 Rank	2024 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
76	77	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	41.6%	14.8%	43.6%
77	78	Otterbein Franklin Retirement Community	Otterbein SeniorLife	Franklin	OH	614	264	91	259	43.0%	14.8%	42.2%
78	79	Westminster Oaks	Westminster Retirement Communities of Florida	Tallahassee	FL	607	415	72	120	68.4%	11.9%	19.8%
79	82	Miami Jewish Health		Miami	FL	607	82	132	393	13.5%	21.7%	64.7%
80	83	Messiah Village	Messiah Lifeways	Mechanicsburg	PA	593	300	138	155	50.6%	23.3%	26.1%
81	84	St. Andrew's Estates	Acts Retirement-Life Communities	Boca Raton	FL	592	433	70	89	73.1%	11.8%	15.0%
82	94	Hoosier Village	BHI Senior Living	Indianapolis	IN	592	300	215	77	50.7%	36.3%	13.0%
83	85	Copeland Oaks		Sebring	OH	592	194	248	150	32.8%	41.9%	25.3%
84	87	Springmoor Life Care Retirement Community		Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
85	86	Givens Estates	Givens Communities	Asheville	NC	582	478	45	59	82.1%	7.7%	10.1%
86	89	San Francisco Campus for Jewish Living		San Francisco	CA	580	0	202	378	0.0%	34.8%	65.2%
87	122	Cypress Cove at HealthPark Florida		Fort Myers	FL	577	425	88	64	73.7%	15.3%	11.1%
88	90	Oakwood Village University Woods	Oakwood Lutheran Senior Ministries	Madison	WI	577	382	100	95	66.2%	17.3%	16.5%
89	91	The Village at Rockville	National Lutheran Communities & Services	Rockville	MD	577	259	18	300	44.9%	3.1%	52.0%
90	92	Moorings Park	The Moorings, Inc.	Naples	FL	576	399	71	106	69.3%	12.3%	18.4%
91	93	Friendship Village Chesterfield	Friendship Village of St. Louis	St. Louis	MO	575	362	92	121	63.0%	16.0%	21.0%
92	95	Asbury Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	70.3%	17.6%	12.1%
93	96	Brookview	Menno Haven	Chambersburg	PA	569	380	89	100	66.8%	15.6%	17.6%
94	97	Richfield Living	Friendship	Salem	VA	567	97	226	244	17.1%	39.9%	43.0%
95	98	Westminster		Austin	TX	561	402	74	85	71.7%	13.2%	15.2%
96	99	Fellowship Square-Phoenix Campus	Christian Care Companies	Phoenix	AZ	559	404	87	68	72.3%	15.6%	12.2%
97	100	Glenaire	BrightSpire	Cary	NC	559	404	84	71	72.3%	15.0%	12.7%
98	101	Bristol Village	National Church Residences	Waverly	OH	557	455	45	57	81.7%	8.1%	10.2%
99	NR	Oak Trace	Lifespace Communities	Downers Grove	IL	557	359	94	104	64.5%	16.9%	18.7%
100	102	Masonicare at Ashlar Village	Masonicare	Wallingford	CT	553	362	191	0	65.5%	34.5%	0.0%

Additional Listings: Largest Individual Campuses (continued)

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

2025 Rank	2024 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
101	107	Breton Woods	Holland Home	Kentwood	MI	552	449	45	58	81.3%	8.2%	10.5%
102	103	Hebrew Home for the Aged Disabled		San Francisco	CA	552	0	190	362	0.0%	34.4%	65.6%
103	104	Masonic Care Community of New York		Utica	NY	551	151	80	320	27.4%	14.5%	58.1%
104	105	Carroll Lutheran Village	Lutheran Social Ministries of Maryland	Westminster	MD	549	396	50	103	72.1%	9.1%	18.8%
105	106	The Brothers of Mercy		Clarence	NY	547	211	96	240	38.6%	17.6%	43.9%
106	112	Rydal Park	HumanGood	Jenkintown	PA	546	378	54	114	69.2%	9.9%	20.9%
107	108	Covenant Living at Windsor Park	Covenant Living Communities & Services	Carol Stream	IL	546	375	103	68	68.7%	18.9%	12.5%
108	109	Fountainview at Eisenburg Village	Los Angeles Jewish Home	Reseda	CA	545	108	271	166	19.8%	49.7%	30.5%
109	110	Medford Leas		Medford	NJ	543	401	75	67	73.8%	13.8%	12.3%
110	111	The RiverWoods at Exeter	The RiverWoods Group	Exeter	NH	542	393	71	78	72.5%	13.1%	14.4%
111	113	Phoebe Allentown	Phoebe Ministries	Allentown	PA	541	88	58	395	16.3%	10.7%	73.0%
112	114	Casa de las Campanas		San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
113	115	Good Samaritan Village of Hastings	The Evangelical Lutheran Good Samaritan Society	Hastings	NE	540	324	51	165	60.0%	9.4%	30.6%
114	116	The Philadelphia Protestant Home		Philadelphia	PA	539	248	175	116	46.0%	32.5%	21.5%
115	117	Mission Ridge / St. John's Lutheran Home	St. John's United	Billings	MT	534	122	226	186	22.8%	42.3%	34.8%
116	118	The Heritage at Lowman	Lutheran Homes of South Carolina	Irmo	SC	533	145	204	184	27.2%	38.3%	34.5%
117	119	Paradise Valley Estates		Fairfield	CA	529	391	78	60	73.9%	14.7%	11.3%
118	120	Luther Acres Senior-Living Community	LutherCare	Lititz	PA	528	352	70	106	66.7%	13.3%	20.1%
119	121	Magnolia Manor of Americus	Magnolia Manor	Americus	GA	528	105	187	236	19.9%	35.4%	44.7%
120	124	Aldersgate		Charlotte	NC	525	300	105	120	57.1%	20.0%	22.9%
121	125	Cristwood Retirement Community	CRISTA Senior Living	Seattle	WA	524	276	81	167	52.7%	15.5%	31.9%
122	126	Westminster Place	Presbyterian Homes, Inc.	Evanston	IL	523	247	88	188	47.2%	16.8%	35.9%
123	40	Luther Manor	United Lutheran Program for the Aging	Wauwatosa	WI	522	250	173	99	47.9%	33.1%	19.0%
124	128	Boutwells Landing	Presbyterian Homes and Services	Oak Park Heights	MN	520	316	96	108	60.8%	18.5%	20.8%
125	129	Lutheran Home	Lutheran Life Communities	Arlington Heights	IL	520	0	136	384	0.0%	26.2%	73.8%

Additional Listings: Largest Individual Campuses (continued)

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

2025 Rank	2024 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
126	NR	Avery Point	National Senior Communities	Richmond	VA	518	518	0	0	100.0%	0.0%	0.0%
127	130	Wesley Willows	Wesley Willows	Rockford	IL	517	260	166	91	50.3%	32.1%	17.6%
128	131	Cardinal Carberry Campus	Cardinal Ritter Senior Services	Saint Louis	MO	517	207	80	230	40.0%	15.5%	44.5%
129	132	The Lutheran Home		Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
130	123	Blue Skies of Texas East	Blue Skies of Texas	San Antonio	TX	512	358	78	76	69.9%	15.2%	14.8%
131	133	Homewood at Plum Creek	Homewood Retirement Centers	Hanover	PA	512	294	98	120	57.4%	19.1%	23.4%
132	134	The Lakewood	Lifespire of Virginia	Richmond	VA	511	354	62	95	69.3%	12.1%	18.6%
133	135	The Advent Christian Village		Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
134	136	The Buckingham		Houston	TX	510	308	110	92	60.4%	21.6%	18.0%
135	138	Londonderry Village		Palmyra	PA	509	382	38	89	75.0%	7.5%	17.5%
136	137	Menno Village	Menno Haven	Chambersburg	PA	509	224	89	196	44.0%	17.5%	38.5%
137	139	Manor Park Inc.		Midland	TX	508	322	114	72	63.4%	22.4%	14.2%
138	140	Ingleside at Rock Creek	Ingleside	Washington	DC	508	232	91	185	45.7%	17.9%	36.4%
139	141	CC Young		Dallas	TX	508	223	160	125	43.9%	31.5%	24.6%
140	165	Cedar Lake Campus	Cedar Community	West Bend	WI	508	100	243	165	19.7%	47.8%	32.5%
141	142	Pine Run Retirement Community	Presbyterian Senior Living	Doylestown	PA	506	282	134	90	55.7%	26.5%	17.8%
142	147	Bridgewater Retirement Community		Bridgewater	VA	505	280	98	127	55.4%	19.4%	25.1%
143	143	Walker Campus	Vivie fka Knute Nelson / Walker Methodist	Minneapolis	MN	504	128	0	376	25.4%	0.0%	74.6%
144	144	Deerfield Episcopal Retirement Community, Inc.		Asheville	NC	502	378	62	62	75.3%	12.4%	12.4%
145	145	Covenant Living at The Holmstad	Covenant Living Communities & Services	Batavia	IL	501	354	62	85	70.7%	12.4%	17.0%
146	127	Wesley Homes Des Moines	Wesley	Des Moines	WA	501	354	75	72	70.7%	15.0%	14.4%
147	NR	Glacier Hills Retirement Community	Trinity Health Senior Communities	Ann Arbor	MI	500	187	229	84	37.4%	45.8%	16.8%
148	146	Havenwood Heritage Heights	United Church of Christ Homes	Concord	NH	497	347	55	95	69.8%	11.1%	19.1%
149	NR	Jewish Home fka Jewish Senior Life		Rochester	NY	496	90	78	328	18.1%	15.7%	66.1%
150	150	Carolina Village Inc		Hendersonville	NC	494	376	60	58	76.1%	12.1%	11.7%

Additional Listings: Largest Individual Campuses (continued)

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

2025 Rank	2024 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB	
						Total	ILU	ALU	NCB				
151	NR	Freedom Plaza	Sun Health	Peoria	AZ	494	338	80	76	68.4%	16.2%	15.4%	
152	160	Bishop Gadsden Episcopal Retirement Community		Charleston	SC	494	283	111	100	57.3%	22.5%	20.2%	
153	148	The Estates at Carpenters		Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%	
154	149	Riddle Village		Media,	PA	493	358	49	86	72.6%	9.9%	17.4%	
155	151	Moravian Manor Communities	Unitas Communities	Lititz	PA	489	315	55	119	64.4%	11.2%	24.3%	
156	153	The Wesleyan		Georgetown	TX	488	262	84	142	53.7%	17.2%	29.1%	
157	154	Lanier Village Estates	Acts Retirement-Life Communities	Gainesville	GA	486	367	55	64	75.5%	11.3%	13.2%	
158	155	Mennonite Home of Albany, Inc		Albany	OR	484	318	124	42	65.7%	25.6%	8.7%	
159	158	Lenbrook		Atlanta	GA	481	403	18	60	83.8%	3.7%	12.5%	
160	159	Friendship Village		Waterloo	IA	481	359	50	72	74.6%	10.4%	15.0%	
161	NR	Sinai Residences of Boca Raton		Boca Raton	FL	480	345	75	60	71.9%	15.6%	12.5%	
162	81	Ohio Living Breckenridge Village	Ohio Living	Willoughby	OH	478	364	42	72	76.2%	8.8%	15.1%	
163	161	Montereau		Tulsa	OK	478	331	73	74	69.2%	15.3%	15.5%	
164	162	Toby & Leon Cooperman Sinai Residences of Boca Raton		Boca Raton	FL	477	345	72	60	72.3%	15.1%	12.6%	
165	163	Covenant Living of Northbrook	Covenant Living Communities & Services	Northbrook	IL	505	477	338	57	82	70.9%	11.9%	17.2%
166	166	Normandy Farms Estates	Acts Retirement-Life Communities	Blue Bell	PA	476	349	58	69	73.3%	12.2%	14.5%	
167	164	Falcons Landing		Potomac Falls	VA	476	327	89	60	68.7%	18.7%	12.6%	
168	167	eliseo	Futura Age	Tacoma	WA	476	235	54	187	49.4%	11.3%	39.3%	
169	169	Phoebe Berks	Phoebe Ministries	Wernersville	PA	475	270	103	102	56.8%	21.7%	21.5%	
170	170	The Forum at Rancho San Antonio		Cupertino	CA	474	342	84	48	72.2%	17.7%	10.1%	
171	172	Compass Park		Franklin	IN	473	171	135	167	36.2%	28.5%	35.3%	
172	NR	Vicar's Landing		Ponte Vedra Beach	FL	471	373	38	60	79.2%	8.1%	12.7%	
173	183	The Glenridge on Palmer Ranch		Sarasota	FL	470	363	48	59	77.2%	10.2%	12.6%	
174	178	Fredericka Manor	Front Porch	Chula Vista	CA	469	280	19	170	59.7%	4.1%	36.2%	
175	179	Wesleyan Homes Inc.		Georgetown	TX	469	243	84	142	51.8%	17.9%	30.3%	

Additional Listings: Largest Individual Campuses (continued)

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

2025 Rank	2024 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/24)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
176	168	Cornwall Manor		Cornwall	PA	468	336	36	96	71.8%	7.7%	20.5%
177	NR	Virginia Mennonite Retirement Community		Harrisonburg	VA	468	266	82	120	56.8%	17.5%	25.6%
178	181	Dunwoody Village		Newtown Square	PA	467	305	81	81	65.3%	17.3%	17.3%
179	175	Abbey Delray	Lifespace Communities	Delray Beach	FL	467	289	78	100	61.9%	16.7%	21.4%
180	152	Arbor Acres United Methodist Retirement Community		Winston Salem	NC	467	289	95	83	61.9%	20.3%	17.8%
181	182	Grandview Terrace Retirement Community	Sun Health	Sun City West	AZ	467	288	32	147	61.7%	6.9%	31.5%
182	NR	Monroe Village	Springpoint Senior Living	Jamesburg	NJ	466	378	28	60	81.1%	6.0%	12.9%
183	184	Epworth Villa		Oklahoma City	OK	464	263	114	87	56.7%	24.6%	18.8%
184	185	Goodwin Living Alexandria	Goodwin Living	Alexandria	VA	464	255	141	68	55.0%	30.4%	14.7%
185	186	Masonic Village at Sewickley	Masonic Villages of the Grand Lodge of Pennsylvania	Sewickley	PA	463	272	63	128	58.7%	13.6%	27.6%
186	187	Presbyterian SeniorCare Oakmont	Presbyterian SeniorCare Network	Oakmont	PA	461	351	50	60	76.1%	10.8%	13.0%
187	188	Baptist Village of Owasso	Baptist Village Communities	Owasso	OK	461	269	72	120	58.4%	15.6%	26.0%
188	189	O'Connor Woods		Stockton	CA	461	245	116	100	53.1%	25.2%	21.7%
189	190	Homestead Village, Inc.		Lancaster	PA	460	374	26	60	81.3%	5.7%	13.0%
190	191	Edgewater at Boca Pointe	Acts Retirement-Life Communities	Boca Raton	FL	460	334	51	75	72.6%	11.1%	16.3%
191	192	Goodwin Living Bailey's Crossroads	Goodwin Living	Falls Church	VA	460	333	58	69	72.4%	12.6%	15.0%
192	NR	Providence Point	Baptist Senior Services	Pittsburgh	PA	459	333	84	42	72.5%	18.3%	9.2%
193	193	Meadowood		Worcester	PA	458	340	61	57	74.2%	13.3%	12.4%
194	NR	Sunnyside	Sunnyside Communities	Harrisonburg	VA	458	283	98	77	61.8%	21.4%	16.8%
195	171	Southampton Estates	Acts Retirement-Life Communities	Southampton	PA	458	281	57	120	61.4%	12.4%	26.2%
196	194	St. Mark Village		Palm Harbor	FL	458	253	128	77	55.2%	27.9%	16.8%
197	195	Bethesda Dilworth	Bethesda Health Group	St. Louis	MO	458	28	0	430	6.1%	0.0%	93.9%
198	177	Friendship Village of Bloomington	Lifespace Communities	Bloomington	MN	457	347	21	89	75.9%	4.6%	19.5%
199	196	The Wesley Community		Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
200	197	Mercy Ridge		Timonium	MD	455	408	47	0	89.7%	10.3%	0.0%

NR: Not Ranked in that year

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Closing Thoughts



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

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