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2020

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

2020

17th Anniversary Edition

LZ 200

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Producing the LZ 200



LeadingAge members strive for innovation and excellence. Our membership touches 4 million lives every day, and includes 6,000 not-for-profit organizations representing the entire field of aging services, 39 state partners, and hundreds of businesses, consumer groups, foundations, and research partners. LeadingAge is also a part of the Global Ageing Network, whose membership spans 30 countries. LeadingAge is a 501(c)(3) tax-exempt charitable organization focused on education, advocacy, and applied research.

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Ziegler is one of the nation's leading underwriters of financing for not-for-profit senior living providers. Ziegler offers creative, tailored solutions to its senior living clientele, including investment banking, financial risk management, merger and acquisition services, investment management, seed capital, FHA/HUD, capital and strategic planning, sponsorship transitions, as well as senior living research, education and communication.

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

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Raising the Bar



LeadingAge members are committed to the following ideals: quality and innovation; integrity and transparency; shared learning and fellowship; inclusion, diversity and equity; and compassion and community. Ours is a public promise to be the trusted voice for aging. This report, based on the latest research and knowledge, helps to build that trust.



A Note from LeadingAge

LeadingAge is pleased to partner with Ziegler to bring you the 17th edition of the LeadingAge Ziegler 200 (“LZ 200”).

This publication has become an eagerly anticipated annual report of the largest, most complex not-for-profit senior living organizations since its inception in 2004. Our 2020 report demonstrates the significant role that LeadingAge 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 going above-and-beyond.

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 pages present a snapshot of the longstanding story of our members’ enlightened leadership, transformation, and good works.

By telling their stories, these organizations are engaged in shared learning, offering their experiences and strategies to the entire field.

At the same time, they are helping to increase public understanding of the older adult 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 listed 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 the older adult services field. I thank you for your interest and on-going support of this report.

A handwritten signature in black ink that reads 'Katie Smith Sloan'.

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 17th edition of the LeadingAge Ziegler publication, compiling data from the largest 200 not-for-profit senior living providers in the country. 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 a special thanks to all the providers who take the time to share their information and who embrace this publication year after year.

Enjoy the 2020 LeadingAge Ziegler 200 publication!



Daniel J. Hermann

Daniel J. Hermann
President & CEO
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Lisa McCracken

Lisa McCracken
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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 2020 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, 2019**.

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.

¹2019 ranking data and amounts provided by Refinitive as of 12/31/19.

Chapter 1

Understanding the LeadingAge Ziegler 200

Importance of Not-for-Profits

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

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 groundbreaking innovations in the way we care for the elderly. A mission-driven philosophy of service with dignity and respect for the person is the inherent benefit the families, residents, and clients of not-for-profit senior living communities have found (whether

independent living, assisted living, nursing care, 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 are systems growing, and what trends are taking place with the type of growth.

By assembling and presenting the combined data and knowledge of LeadingAge and Ziegler, the LZ 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 organizations 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. Additional rankings of affordable housing providers are included in Chapter 6 of the report. In previous years, systems that were comprised primarily of acute or post-acute services or health care systems were also excluded. Beginning with the 2016 report, additional systems were included to reflect not-for-profit health systems that have a separate division, or ministry, with a distinct focus on operating as a senior living system. Two examples of such a system are Ascension Living 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 2020 LZ 200 were provided and confirmed (“confirmation”) by 163 of the 200 organizations. Seven confirmations were received from the “Over 200,” the organizations ranked from 201 to 215.

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 20,917 units to 378 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 2.5%, 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 73% 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 few years since the economic recession. Most of the growth in recent years has been from within existing campuses. At the same time, organizations continue to dispose of dated nursing homes or financially stressed communities. Recent years have also seen an uptick in the number of organizations growing through affiliation, 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, 51% 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 now offered by slightly more than 10% of the LZ 200 (1% more than last year).
- ***A glimpse of the geography ...*** The systems provide market-rate senior living in 48 states. Pennsylvania hosts the highest number of system headquarters in the LZ 200. Minnesota has the largest total number of communities, with 221.



- **Technology** ... On average, 80% of the LZ 200 communities have adopted electronic point of care/point of service documentation systems, and more than 75% implement 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 60% use this software. A category added in 2019, social connectedness/resident engagement, reveals that 61% use this technology; and new this year, 31% system providers utilize more advanced analytical tools.
- **Joint ventures and partnerships** ... Nearly 34% 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. This is slightly more than the 33% reported in the 2019 report. Four out of 10 of the providers also indicated that they are engaged in a formal contract related to health care reform, whether it be an Accountable Care Organization (ACO) or a bundled payment agreement. This figure has grown steadily over the past few years from roughly 25% in 2013 to 48% in 2019.

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 2020 and 2019 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 2020 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations.

The 2020 Rank column displays the numerical ranking of each system according to its 12/31/19 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 2019 Rank shows the numerical ranking of the listed organization in last year’s publication (according to its 12/31/18 data) listing of the same type. The organizations that show “NR” (Not Ranked) were not included in the LZ 200 rankings for 2019. Also note that with the increase to the largest 200 in the 2019 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 215 as of 12/31/2019.

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.

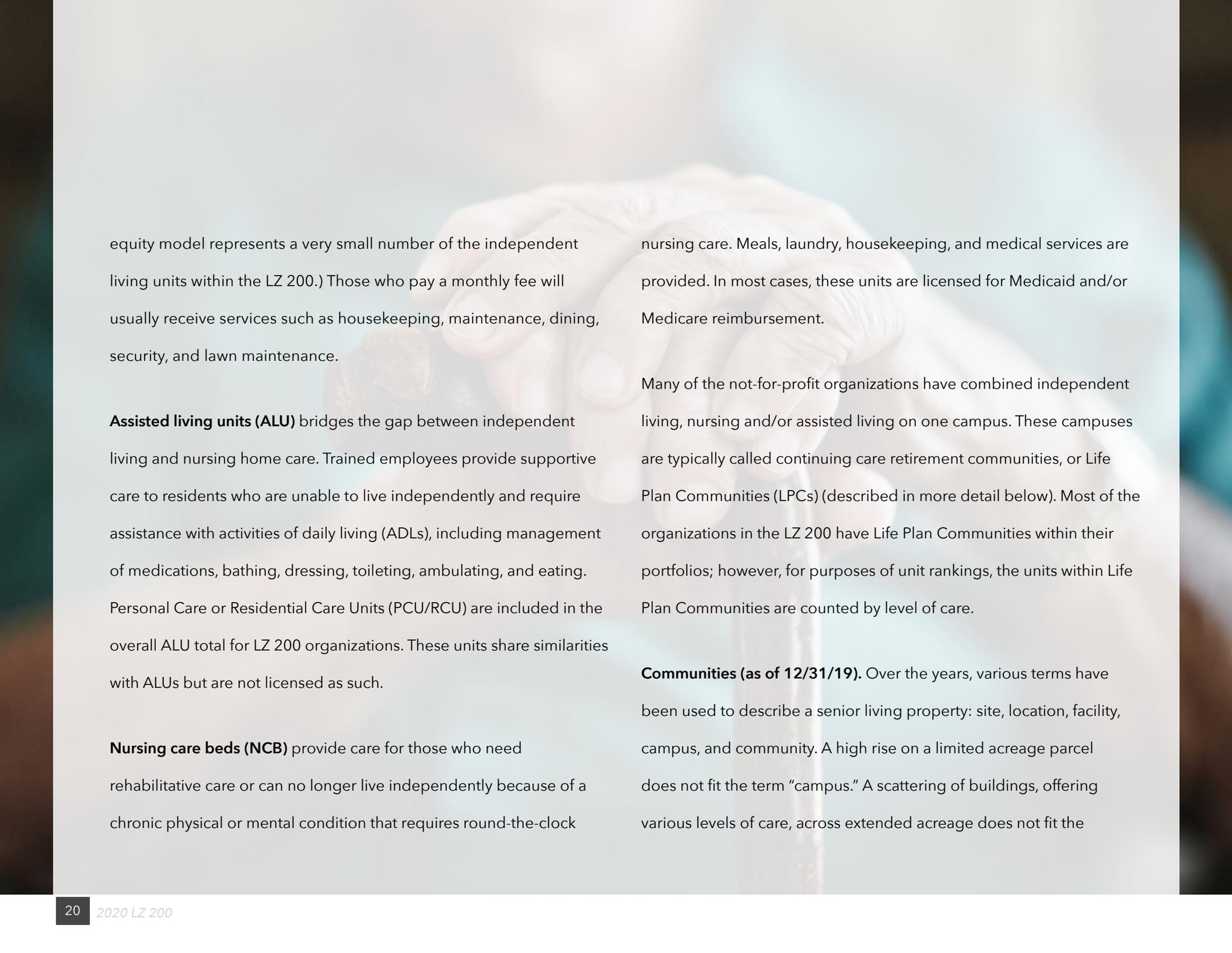
State. This field notes the location of the system’s corporate headquarters. For example, Covenant Living Communities and

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

Units (as of 12/31/19). The systems listed in the 2020 LZ 200 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/19. 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 6*).

Total. The Total column is the sum of the units listed in each of the three different levels of care (described in more detail below). This total is the variable by which the LZ 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 12/31/19). Over the years, various terms have been used to describe a senior living property: site, location, facility, campus, and community. A high rise on a limited acreage parcel does not fit the term “campus.” A scattering of buildings, offering various levels of care, across extended acreage does not fit the

term “facility.” We believe the best all-encompassing word to use is “community.” The communities examined are life plan communities (**LPC**), independent living communities (**IL**), assisted living communities (**AL**), and nursing homes (**NH**). It is important to note that a single Life Plan Community may include ILU (independent living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will contain at least independent living and nursing care . The Life Plan Community’s resident payment plans may include entrance fee, condo/co-op, and/or rental programs. Generally the majority of the Life Plan Community’s units are not NCB. 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.

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 definition may be slightly different from the organizational labels for their communities.

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations Ranked by Total Senior Living Units

2020 Rank	2019 Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses	MA	20,917	18,136	1,628	1,153	16	16	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	15,507	4,795	2,110	8,602	142	53	8	9	72
3	3	ACTS Retirement Services, Inc.	PA	9,592	6,737	1,118	1,737	26	26	0	0	0
4	5	Ascension Living	MO	8,129	2,124	1,203	4,802	48	2	5	3	38
5	4	Presbyterian Homes and Services	MN	7,958	4,118	2,389	1,451	46	15	28	0	3
6	6	Trinity Health Senior Communities	MI	5,715	1,839	1,199	2,677	54	6	13	14	21
7	8	HumanGood	CA	5,474	3,351	1,093	1,030	21	20	1	0	0
8	7	Covenant Living Communities & Services	IL	5,228	3,363	884	981	18	13	2	2	1
9	11	Lifespace Communities Inc.	IA	5,179	3,663	535	981	15	15	0	0	0
10	9	Benedictine fka Benedictine Health System	MN	4,394	726	1,496	2,172	33	25	1	4	3
11	12	Westminster Communities of Florida	FL	4,155	2,852	522	781	13	10	3	0	0
12	10	Retirement Housing Foundation	CA	4,098	2,646	841	611	18	9	8	1	0
13	13	Cassia	MN	3,920	522	1,512	1,886	51	0	5	28	18
14	14	The Kendal Corporation	PA	3,629	2,512	609	508	15	13	2	0	0
15	15	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	20	12	6	2	0
16	17	Asbury Communities, Inc.	MD	3,591	2,147	535	909	8	8	0	0	0
17	16	Lutheran Senior Services	MO	3,541	1,678	744	1,119	11	8	0	1	2
18	18	Ohio Living	OH	3,286	1,732	567	987	13	13	0	0	0
19	19	The Carmelite System, Inc.	NY	3,157	144	421	2,592	16	1	1	2	12
20	20	Pacific Retirement Services, Inc.	OR	3,073	2,310	378	385	9	9	0	0	0
21	21	Front Porch Communities and Services	CA	2,860	2,159	183	518	10	5	5	0	0
22	22	Concordia Lutheran Ministries	PA	2,806	996	1,147	663	14	6	0	6	2
23	23	Otterbein SeniorLife	OH	2,630	1,123	496	1,011	15	6	0	0	9
24	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,557	1,614	259	684	5	3	1	0	1
25	24	Springpoint Senior Living Inc.	NJ	2,548	1,740	317	491	9	8	0	0	1

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

2020 Rank	2019 Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	26	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
27	27	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	9	9	0	0	0
28	28	Christian Care Companies	AZ	2,399	1,911	420	68	7	0	6	0	1
29	29	Presbyterian Manors of Mid-America, Inc.	KS	2,247	908	563	776	16	15	0	1	0
30	30	Shell Point Retirement Community	FL	2,204	1,406	449	349	2	2	0	0	0
31	31	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
32	33	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
33	34	Willow Valley Communities	PA	2,044	1,547	214	283	3	3	0	0	0
34	36	Homewood Retirement Centers Inc.	MD	1,873	1,134	288	451	5	5	0	0	0
35	38	Transforming Age	WA	1,848	1,097	751	0	14	3	7	4	0
36	44	WesleyLife	IA	1,843	808	375	660	10	10	0	0	0
37	37	Greencroft Communities	IN	1,842	646	586	610	9	7	0	2	0
38	39	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
39	43	Bethesda Senior Living Communities	CO	1,762	111	1,651	0	18	0	2	16	0
40	35	Franciscan Communities, Inc.	IL	1,700	742	345	613	7	4	1	2	0
41	55	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	6	6	0	0	0
42	40	Loretto	NY	1,684	210	551	923	9	1	2	4	2
43	42	Covenant Health	MA	1,636	0	364	1,272	12	0	0	3	9
44	41	National Church Residences	OH	1,607	861	521	225	9	3	3	3	0
45	45	Hebrew SeniorLife	MA	1,592	659	119	814	4	2	1	0	1
46	46	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
47	48	Lutheran Life Communities	IL	1,551	408	360	783	6	4	0	0	2
48	50	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
49	64	BHI Senior Living Inc	IN	1,517	472	693	352	5	5	0	0	0
50	51	Eskaton	CA	1,507	393	688	426	12	1	1	7	3

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

2020 Rank	2019 Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	57	United Church Homes, Inc.	OH	1,491	448	273	770	11	5	2	0	4
52	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
53	56	Bethesda Health Group, Inc	MO	1,460	727	78	655	12	0	6	2	4
54	53	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
55	49	Providence Life Services	IL	1,421	767	372	282	7	1	4	1	1
56	54	Presbyterian Homes	IL	1,420	842	237	341	4	3	1	0	0
57	47	Covia Communities	CA	1,352	954	100	298	5	5	0	0	0
58	58	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
59	76	Methodist Retirement Communities	TX	1,316	629	393	294	7	5	1	1	0
60	59	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
61	60	Lutheran Services Carolinas	NC	1,302	311	259	732	9	1	1	1	6
62	61	Presbyterian Village of Michigan	MI	1,270	904	264	102	10	1	7	2	0
63	71	LifeSpire of Virginia	VA	1,269	757	285	227	4	4	0	0	0
64	68	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
65	67	American Baptist Homes of the Midwest	MN	1,245	384	253	608	7	5	0	0	2
66	62	Immanuel	NE	1,240	646	393	201	17	7	1	7	2
67	63	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
68	151	UMRC and Porter Hills	MI	1,199	678	335	186	6	3	2	1	0
69	69	Holland Home	MI	1,196	749	288	159	6	2	0	2	2
70	65	SpiriTrust Lutheran	PA	1,193	557	292	344	6	6	0	0	0
71	92	Western Home Services	IA	1,184	587	314	283	5	2	2	0	1
72	72	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
73	78	Eventide	MN	1,142	71	469	602	6	5	0	1	0
74	111	Ingleside	MD	1,128	832	157	139	3	3	0	0	0
75	66	Friendship Senior Options	IL	1,127	701	184	242	2	2	0	0	0

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

2020 Rank	2019 Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	75	Lutheran SeniorLife	PA	1,123	489	192	442	5	2	3	0	0
77	70	Pinnacle Living	VA	1,121	514	393	214	5	5	0	0	0
78	79	United Methodist Homes	NY	1,088	389	273	426	4	3	1	0	0
79	73	Walker Methodist	MN	1,075	0	748	327	9	0	0	8	1
80	77	Lutheran Homes of SC	SC	1,060	404	306	350	5	5	0	0	0
81	87	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	3	3	0	0	0
82	81	Saint Therese	MN	1,010	475	125	410	5	3	1	0	1
83	85	Blue Skies of Texas	TX	1,001	728	129	144	2	2	0	0	0
84	80	Presbyterian Communities of South Carolina	SC	1,001	411	316	274	6	6	0	0	0
85	83	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
86	84	Friendship Villages of St. Louis	MO	987	691	88	208	2	2	0	0	0
87	94	The United Methodist Retirement Homes, Inc.	NC	984	674	108	202	3	3	0	0	0
88	86	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
89	88	Baruch fka Baruch Senior Ministries	MI	957	2	955	0	24	0	0	24	0
90	89	Haverland Carter Lifestyle Group	NM	954	414	442	98	4	2	0	2	0
91	90	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	2	2	0	0	0
92	91	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
93	93	Sequoia Living, Inc	CA	946	702	103	141	3	3	0	0	0
94	95	Wesley	WA	930	592	154	184	3	2	1	0	0
95	96	Christian Care Communities	KY	930	365	160	405	7	5	1	1	0
96	105	Christian Living Communities	CO	921	464	261	196	5	3	0	2	0
97	99	St. John's	NY	916	403	38	475	4	0	1	1	2
98	104	St. Ann's of Greater Rochester, Inc.	NY	914	297	75	542	3	2	1	0	0
99	102	Givens Communities	NC	895	674	91	130	2	2	0	0	0
100	101	Masonic Homes of Kentucky	KY	888	450	151	287	3	1	1	0	1

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

2020 Rank	2019 Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	103	United Methodist Communities	NJ	878	88	542	248	4	1	0	3	0
102	108	St. Andrew's Resources for Seniors System	MO	877	379	208	290	6	1	2	1	2
103	112	Sun Health Services fka Sun Health Senior Living LLC	AZ	866	637	114	115	3	3	0	0	0
104	97	Menno Haven, Inc.	PA	858	434	178	246	2	2	0	0	0
105	106	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
106	107	Living Branches	PA	839	459	237	143	3	2	0	1	0
107	109	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
108	131	The RiverWoods Group	NH	834	623	124	87	3	3	0	0	0
109	110	Lutheran Social Ministries of Maryland	MD	823	639	69	115	2	2	0	0	0
110	129	Landis Communities	PA	811	548	160	103	3	1	1	1	0
111	116	Life Enriching Communities	OH	811	532	135	144	2	2	0	0	0
112	113	LutherCare	PA	810	473	126	211	3	2	0	0	1
113	114	Messiah Lifeways	PA	807	440	183	184	2	1	1	0	0
114	115	Simpson Senior Servies	PA	802	454	170	178	3	3	0	0	0
115	117	Mather fka Mather LifeWays	IL	801	665	59	77	3	2	1	0	0
116	118	Wesley Willows	IL	799	539	169	91	2	1	1	0	0
117	119	National Lutheran Communities & Services	MD	795	435	180	180	3	0	2	1	0
118	120	The Ohio Masonic Home	OH	787	377	246	164	3	2	0	1	0
119	122	Sunnyside Presbyterian Home	VA	786	495	157	134	3	3	0	0	0
120	121	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
121	123	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
122	124	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	3	1	0	0	2
123	127	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
124	128	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
125	126	Samaritas	MI	762	294	120	348	5	1	2	0	2

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

2020 Rank	2019 Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	125	Christian Care Centers	TX	757	409	229	119	3	3	0	0	0
127	130	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	3	3	0	0	0
128	132	Benevolent Corporation Cedar Community	WI	746	409	227	110	8	0	3	4	1
129	133	Vista Prairie Communities	MN	736	100	636	0	8	0	0	8	0
130	134	Moorings Park	FL	731	511	114	106	2	2	0	0	0
131	136	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
132	137	Morningside Ministries	TX	707	343	154	210	2	2	0	0	0
133	138	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
134	139	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
135	141	Maple Knoll Communities, Inc.	OH	686	388	91	207	2	2	0	0	0
136	135	The Wesley Communities fka Methodist ElderCare Services	OH	678	338	234	106	3	1	2	0	0
137	142	Sunset Senior Communities fka Sunset Retirement Communities & Serv.	MI	677	304	263	110	4	2	0	1	1
138	144	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
139	145	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	4	1	2	0	1
140	154	Smith Senior Living	IL	658	322	144	192	2	2	0	0	0
141	146	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
142	159	Baptist Homes Society	PA	653	326	138	189	2	1	0	0	1
143	148	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
144	149	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
145	150	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
146	NR	Luther Manor	WI	633	325	156	152	2	1	0	1	0
147	143	CRISTA Senior Living	WA	624	374	141	109	2	2	0	0	0
148	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
149	153	Baptist Retirement Homes of North Carolina Incorporated	NC	601	262	138	201	4	2	0	1	1
150	155	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	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

2020 Rank	2019 Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	156	Genacross Lutheran Services	OH	598	138	175	285	4	2	1	0	1
152	157	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
153	158	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
154	160	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
155	162	Friends Homes, Inc.	NC	568	359	100	109	2	2	0	0	0
156	164	Sholom	MN	568	154	142	272	5	0	1	2	2
157	165	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
158	161	Ebenezer Society	MN	567	0	320	247	8	0	0	5	3
159	166	Episcopal Communities & Services	CA	566	436	82	48	3	3	0	0	0
160	167	Bethel	NY	563	170	130	263	5	1	1	1	2
161	168	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
162	169	Friendly Senior Living	NY	554	298	56	200	4	0	2	1	1
163	170	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
164	171	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
165	172	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
166	173	Medford Leas	NJ	535	392	119	24	2	1	1	0	0
167	175	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
168	174	Rockwood Retirement Communities	WA	528	368	95	65	2	2	0	0	0
169	176	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
170	140	Lutheran Life Villages	IN	524	135	65	324	3	1	0	0	2
171	177	Redstone Presbyterian SeniorCare	PA	516	305	134	77	7	0	3	3	1
172	178	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
173	180	Presbyterian Homes of Georgia	GA	501	117	89	295	5	2	3	0	0
174	181	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
175	182	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2

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

2020 Rank	2019 Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	183	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
177	184	Knute Nelson	MN	484	211	180	93	6	0	2	3	1
178	NR	St. Paul's Episcopal Home, Inc.	CA	481	135	287	59	4	0	1	2	1
179	185	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
180	179	Avinity fka Avinity Senior Living	MN	477	363	114	0	6	0	3	3	0
181	186	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
182	187	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
183	188	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
184	189	Allegheny Lutheran Social Ministries	PA	451	203	96	152	3	3	0	0	0
185	190	Beechwood Health Care Center, Inc.	NY	447	110	65	272	3	0	1	1	1
186	191	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
187	192	Council for Jewish Elderly	IL	441	36	165	240	3	0	1	1	1
188	193	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
189	194	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
190	197	Parker Health Group, Inc.	NJ	427	0	80	347	5	0	0	1	4
191	195	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
192	NR	Jewish Senior Life of Metropolitan Detroit	MI	420	290	130	0	4	0	2	2	0
193	196	A.G. Rhodes Health & Rehab	GA	418	0	0	418	3	0	0	0	3
194	198	Colonial Senior Services, Inc	OH	411	182	101	128	3	3	0	0	0
195	200	SCBMA	SC	402	94	134	174	2	2	0	0	0
196	199	Clark Retirement Community, Inc.	MI	401	194	168	39	2	2	0	0	0
197	NR	Saint Mary's Home of Erie	PA	393	26	148	219	6	1	1	2	2
198	NR	Valley View Retirement Community	PA	390	133	95	162	2	2	0	0	0
199	NR	Good Shepherd Communities	NY	383	194	105	84	2	2	0	0	0
200	NR	Cornerstone Village	TN	378	176	99	103	2	1	0	1	0

NR: Not Ranked in that year

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations Ranked by Independent Living Units

2020 IL Rank	2019 IL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses	MA	20,917	18,136	1,628	1,153	16	16	0	0	0
2	2	ACTS Retirement Services, Inc.	PA	9,592	6,737	1,118	1,737	26	26	0	0	0
3	3	The Evangelical Lutheran Good Samaritan Society	SD	15,507	4,795	2,110	8,602	142	53	8	9	72
4	4	Presbyterian Homes and Services	MN	7,958	4,118	2,389	1,451	46	15	28	0	3
5	6	Lifespace Communities Inc.	IA	5,179	3,663	535	981	15	15	0	0	0
6	5	Covenant Living Communities & Services	IL	5,228	3,363	884	981	18	13	2	2	1
7	7	HumanGood	CA	5,474	3,351	1,093	1,030	21	20	1	0	0
8	9	Westminster Communities of Florida	FL	4,155	2,852	522	781	13	10	3	0	0
9	8	Retirement Housing Foundation	CA	4,098	2,646	841	611	18	9	8	1	0
10	10	The Kendal Corporation	PA	3,629	2,512	609	508	15	13	2	0	0
11	11	Pacific Retirement Services, Inc.	OR	3,073	2,310	378	385	9	9	0	0	0
12	14	Front Porch Communities and Services	CA	2,860	2,159	183	518	10	5	5	0	0
13	13	Asbury Communities, Inc.	MD	3,591	2,147	535	909	8	8	0	0	0
14	15	Ascension Living	MO	8,129	2,124	1,203	4,802	48	2	5	3	38
15	16	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	20	12	6	2	0
16	17	Christian Care Companies	AZ	2,399	1,911	420	68	7	0	6	0	1
17	12	Trinity Health Senior Communities	MI	5,715	1,839	1,199	2,677	54	6	13	14	21
18	18	Springpoint Senior Living Inc.	NJ	2,548	1,740	317	491	9	8	0	0	1
19	19	Ohio Living	OH	3,286	1,732	567	987	13	13	0	0	0
20	20	Lutheran Senior Services	MO	3,541	1,678	744	1,119	11	8	0	1	2
21	21	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,557	1,614	259	684	5	3	1	0	1
22	22	Willow Valley Communities	PA	2,044	1,547	214	283	3	3	0	0	0
23	23	Shell Point Retirement Community	FL	2,204	1,406	449	349	2	2	0	0	0
24	27	Homewood Retirement Centers Inc.	MD	1,873	1,134	288	451	5	5	0	0	0
25	26	Otterbein SeniorLife	OH	2,630	1,123	496	1,011	15	6	0	0	9

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

2020 IL Rank	2019 IL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	25	Transforming Age	WA	1,848	1,097	751	0	14	3	7	4	0
27	37	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	6	6	0	0	0
28	33	Concordia Lutheran Ministries	PA	2,806	996	1,147	663	14	6	0	6	2
29	28	Covia Communities	CA	1,352	954	100	298	5	5	0	0	0
30	29	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
31	31	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	9	9	0	0	0
32	30	Presbyterian Manors of Mid-America, Inc.	KS	2,247	908	563	776	16	15	0	1	0
33	32	Presbyterian Village of Michigan	MI	1,270	904	264	102	10	1	7	2	0
34	34	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
35	36	National Church Residences	OH	1,607	861	521	225	9	3	3	3	0
36	35	Presbyterian Homes	IL	1,420	842	237	341	4	3	1	0	0
37	63	Ingleside	MD	1,128	832	157	139	3	3	0	0	0
38	39	WesleyLife	IA	1,843	808	375	660	10	10	0	0	0
39	38	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
40	45	Providence Life Services	IL	1,421	767	372	282	7	1	4	1	1
41	43	LifeSpire of Virginia	VA	1,269	757	285	227	4	4	0	0	0
42	42	Holland Home	MI	1,196	749	288	159	6	2	0	2	2
43	41	Franciscan Communities, Inc.	IL	1,700	742	345	613	7	4	1	2	0
44	46	Blue Skies of Texas	TX	1,001	728	129	144	2	2	0	0	0
45	44	Bethesda Health Group, Inc	MO	1,460	727	78	655	12	0	6	2	4
46	47	Benedictine fka Benedictine Health System	MN	4,394	726	1,496	2,172	33	25	1	4	3
47	54	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	3	3	0	0	0
48	48	Sequoia Living, Inc	CA	946	702	103	141	3	3	0	0	0
49	40	Friendship Senior Options	IL	1,127	701	184	242	2	2	0	0	0
50	49	Friendship Villages of St. Louis	MO	987	691	88	208	2	2	0	0	0

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

2020 IL Rank	2019 IL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	132	UMRC and Porter Hills	MI	1,199	678	335	186	6	3	2	1	0
52	59	The United Methodist Retirement Homes, Inc.	NC	984	674	108	202	3	3	0	0	0
53	50	Givens Communities	NC	895	674	91	130	2	2	0	0	0
54	51	Mather fka Mather LifeWays	IL	801	665	59	77	3	2	1	0	0
55	52	Hebrew SeniorLife	MA	1,592	659	119	814	4	2	1	0	1
56	53	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
57	56	Greencroft Communities	IN	1,842	646	586	610	9	7	0	2	0
58	55	Immanuel	NE	1,240	646	393	201	17	7	1	7	2
59	57	Lutheran Social Ministries of Maryland	MD	823	639	69	115	2	2	0	0	0
60	58	Sun Health Services fka Sun Health Senior Living LLC	AZ	866	637	114	115	3	3	0	0	0
61	78	Methodist Retirement Communities	TX	1,316	629	393	294	7	5	1	1	0
62	61	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
63	72	The RiverWoods Group	NH	834	623	124	87	3	3	0	0	0
64	62	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	2	2	0	0	0
65	64	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
66	65	Wesley	WA	930	592	154	184	3	2	1	0	0
67	74	Western Home Services	IA	1,184	587	314	283	5	2	2	0	1
68	66	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
69	68	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
70	69	SpiriTrust Lutheran	PA	1,193	557	292	344	6	6	0	0	0
71	80	Landis Communities	PA	811	548	160	103	3	1	1	1	0
72	70	Wesley Willows	IL	799	539	169	91	2	1	1	0	0
73	71	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
74	76	Life Enriching Communities	OH	811	532	135	144	2	2	0	0	0
75	73	Emerald Communities	WA	725	527	107	91	2	2	0	0	0

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

2020 IL Rank	2019 IL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	75	Cassia	MN	3,920	522	1,512	1,886	51	0	5	28	18
77	81	Pinnacle Living	VA	1,121	514	393	214	5	5	0	0	0
78	77	Moorings Park	FL	731	511	114	106	2	2	0	0	0
79	79	Sunnyside Presbyterian Home	VA	786	495	157	134	3	3	0	0	0
80	82	Lutheran SeniorLife	PA	1,123	489	192	442	5	2	3	0	0
81	85	Saint Therese	MN	1,010	475	125	410	5	3	1	0	1
82	84	LutherCare	PA	810	473	126	211	3	2	0	0	1
83	142	BHI Senior Living Inc	IN	1,517	472	693	352	5	5	0	0	0
84	86	Christian Living Communities	CO	921	464	261	196	5	3	0	2	0
85	88	Living Branches	PA	839	459	237	143	3	2	0	1	0
86	89	Simpson Senior Servies	PA	802	454	170	178	3	3	0	0	0
87	90	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
88	91	Masonic Homes of Kentucky	KY	888	450	151	287	3	1	1	0	1
89	130	United Church Homes, Inc.	OH	1,491	448	273	770	11	5	2	0	4
90	92	Messiah Lifeways	PA	807	440	183	184	2	1	1	0	0
91	93	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
92	94	Episcopal Communities & Services	CA	566	436	82	48	3	3	0	0	0
93	95	National Lutheran Communities & Services	MD	795	435	180	180	3	0	2	1	0
94	83	Menno Haven, Inc.	PA	858	434	178	246	2	2	0	0	0
95	96	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	3	3	0	0	0
96	97	Haverland Carter Lifestyle Group	NM	954	414	442	98	4	2	0	2	0
97	98	Presbyterian Communities of South Carolina	SC	1,001	411	316	274	6	6	0	0	0
98	101	Christian Care Centers	TX	757	409	229	119	3	3	0	0	0
99	89	Benevolent Corporation Cedar Community	WI	746	409	227	110	8	0	3	4	1
100	102	Lutheran Life Communities	IL	1,551	408	360	783	6	4	0	0	2

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

2020 IL Rank	2019 IL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	100	Lutheran Homes of SC	SC	1,060	404	306	350	5	5	0	0	0
102	103	St. John's	NY	916	403	38	475	4	0	1	1	2
103	104	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
104	106	Eskaton	CA	1,507	393	688	426	12	1	1	7	3
105	105	Medford Leas	NJ	535	392	119	24	2	1	1	0	0
106	121	United Methodist Homes	NY	1,088	389	273	426	4	3	1	0	0
107	107	Maple Knoll Communities, Inc.	OH	686	388	91	207	2	2	0	0	0
108	115	American Baptist Homes of the Midwest	MN	1,245	384	253	608	7	5	0	0	2
109	108	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
110	110	St. Andrew's Resources for Seniors System	MO	877	379	208	290	6	1	2	1	2
111	111	The Ohio Masonic Home	OH	787	377	246	164	3	2	0	1	0
112	113	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
113	114	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
114	109	CRISTA Senior Living	WA	624	374	141	109	2	2	0	0	0
115	116	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
116	117	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	4	1	2	0	1
117	120	Rockwood Retirement Communities	WA	528	368	95	65	2	2	0	0	0
118	118	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
119	119	Christian Care Communities	KY	930	365	160	405	7	5	1	1	0
120	141	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
121	126	Avinity fka Avinity Senior Living	MN	477	363	114	0	6	0	3	3	0
122	123	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
123	122	Friends Homes, Inc.	NC	568	359	100	109	2	2	0	0	0
124	124	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
125	125	Morningside Ministries	TX	707	343	154	210	2	2	0	0	0

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

2020 IL Rank	2019 IL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	127	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
127	129	The Wesley Communities fka Methodist ElderCare Services	OH	678	338	234	106	3	1	2	0	0
128	131	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
129	133	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
130	148	Baptist Homes Society	PA	653	326	138	189	2	1	0	0	1
131	NR	Luther Manor	WI	633	325	156	152	2	1	0	1	0
132	134	Smith Senior Living	IL	658	322	144	192	2	2	0	0	0
133	135	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
134	136	Lutheran Services Carolinas	NC	1,302	311	259	732	9	1	1	1	6
135	139	Redstone Presbyterian SeniorCare	PA	516	305	134	77	7	0	3	3	1
136	137	Sunset Senior Communities fka Sunset Retirement Communities & Serv.	MI	677	304	263	110	4	2	0	1	1
137	138	Friendly Senior Living	NY	554	298	56	200	4	0	2	1	1
138	149	St. Ann's of Greater Rochester, Inc.	NY	914	297	75	542	3	2	1	0	0
139	140	Samaritas	MI	762	294	120	348	5	1	2	0	2
140	NR	Jewish Senior Life of Metropolitan Detroit	MI	420	290	130	0	4	0	2	2	0
141	144	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	3	1	0	0	2
142	146	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
143	147	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
144	145	Baptist Retirement Homes of North Carolina Incorporated	NC	601	262	138	201	4	2	0	1	1
145	150	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
146	151	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
147	152	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
148	153	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
149	154	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
150	155	Christian Village Communities	OH	559	221	190	148	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

2020 IL Rank	2019 IL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	156	Knute Nelson	MN	484	211	180	93	6	0	2	3	1
152	157	Loretto	NY	1,684	210	551	923	9	1	2	4	2
153	158	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
154	159	Allegheny Lutheran Social Ministries	PA	451	203	96	152	3	3	0	0	0
155	184	Clark Retirement Community, Inc.	MI	401	194	168	39	2	2	0	0	0
156	NR	Good Shepherd Communities	NY	383	194	105	84	2	2	0	0	0
157	160	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
158	161	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
159	164	Colonial Senior Services, Inc	OH	411	182	101	128	3	3	0	0	0
160	162	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
161	NR	Cornerstone Village	TN	378	176	99	103	2	1	0	1	0
162	163	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
163	165	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
164	166	Bethel	NY	563	170	130	263	5	1	1	1	2
165	167	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
166	168	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
167	170	Sholom	MN	568	154	142	272	5	0	1	2	2
168	172	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
169	174	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
170	175	The Carmelite System, Inc.	NY	3,157	144	421	2,592	16	1	1	2	12
171	176	Genacross Lutheran Services	OH	598	138	175	285	4	2	1	0	1
172	177	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
173	171	Lutheran Life Villages	IN	524	135	65	324	3	1	0	0	2
174	178	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
175	NR	St. Paul's Episcopal Home, Inc.	CA	481	135	287	59	4	0	1	2	1

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

2020 IL Rank	2019 IL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	NR	Valley View Retirement Community	PA	390	133	95	162	2	2	0	0	0
177	179	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
178	180	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
179	181	Presbyterian Homes of Georgia	GA	501	117	89	295	5	2	3	0	0
180	182	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
181	169	Bethesda Senior Living Communities	CO	1,762	111	1,651	0	18	0	2	16	0
182	183	Beechwood Health Care Center, Inc.	NY	447	110	65	272	3	0	1	1	1
183	185	Vista Prairie Communities	MN	736	100	636	0	8	0	0	8	0
184	186	SCBMA	SC	402	94	134	174	2	2	0	0	0
185	187	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
186	188	United Methodist Communities	NJ	878	88	542	248	4	1	0	3	0
187	189	Eventide	MN	1,142	71	469	602	6	5	0	1	0
188	190	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
189	191	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
190	192	Council for Jewish Elderly	IL	441	36	165	240	3	0	1	1	1
191	NR	Saint Mary's Home of Erie	PA	393	26	148	219	6	1	1	2	2
192	193	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
193	194	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
194	195	Baruch fka Baruch Senior Ministries	MI	957	2	955	0	24	0	0	24	0
195	196	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
196	197	Covenant Health	MA	1,636	0	364	1,272	12	0	0	3	9
197	67	Walker Methodist	MN	1,075	0	748	327	9	0	0	8	1
198	198	Ebenezer Society	MN	567	0	320	247	8	0	0	5	3
199	200	Parker Health Group, Inc.	NJ	427	0	80	347	5	0	0	1	4
200	199	A.G. Rhodes Health & Rehab	GA	418	0	0	418	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 Total Assisted Living Units

2020 AL Rank	2019 AL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	Presbyterian Homes and Services	MN	7,958	4,118	2,389	1,451	46	15	28	0	3
2	2	The Evangelical Lutheran Good Samaritan Society	SD	15,507	4,795	2,110	8,602	142	53	8	9	72
3	5	Bethesda Senior Living Communities	CO	1,762	111	1,651	0	18	0	2	16	0
4	3	National Senior Campuses	MA	20,917	18,136	1,628	1,153	16	16	0	0	0
5	4	Cassia	MN	3,920	522	1,512	1,886	51	0	5	28	18
6	6	Benedictine fka Benedictine Health System	MN	4,394	726	1,496	2,172	33	25	1	4	3
7	7	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
8	8	Ascension Living	MO	8,129	2,124	1,203	4,802	48	2	5	3	38
9	10	Trinity Health Senior Communities	MI	5,715	1,839	1,199	2,677	54	6	13	14	21
10	9	Concordia Lutheran Ministries	PA	2,806	996	1,147	663	14	6	0	6	2
11	11	Acts Retirement Services, Inc.	PA	9,592	6,737	1,118	1,737	26	26	0	0	0
12	13	HumanGood	CA	5,474	3,351	1,093	1,030	21	20	1	0	0
13	12	Baruch fka Baruch Senior Ministries	MI	957	2	955	0	24	0	0	24	0
14	15	Covenant Living Communities & Services	IL	5,228	3,363	884	981	18	13	2	2	1
15	14	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
16	16	Retirement Housing Foundation	CA	4,098	2,646	841	611	18	9	8	1	0
17	24	Transforming Age	WA	1,848	1,097	751	0	14	3	7	4	0
18	92	Walker Methodist	MN	1,075	0	748	327	9	0	0	8	1
19	18	Lutheran Senior Services	MO	3,541	1,678	744	1,119	11	8	0	1	2
20	22	BHI Senior Living Inc	IN	1,517	472	693	352	5	5	0	0	0
21	19	Eskaton	CA	1,507	393	688	426	12	1	1	7	3
22	20	Vista Prairie Communities	MN	736	100	636	0	8	0	0	8	0
23	21	The Kendal Corporation	PA	3,629	2,512	609	508	15	13	2	0	0
24	23	Greencroft Communities	IN	1,842	646	586	610	9	7	0	2	0
25	25	Ohio Living	OH	3,286	1,732	567	987	13	13	0	0	0

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Total Assisted Living Units

2020 AL Rank	2019 AL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	27	Presbyterian Manors of Mid-America, Inc.	KS	2,247	908	563	776	16	15	0	1	0
27	28	Loretto	NY	1,684	210	551	923	9	1	2	4	2
28	29	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	20	12	6	2	0
29	30	United Methodist Communities	NJ	878	88	542	248	4	1	0	3	0
30	111	Lifespace Communities Inc.	IA	5,179	3,663	535	981	15	15	0	0	0
31	34	Asbury Communities, Inc.	MD	3,591	2,147	535	909	8	8	0	0	0
32	31	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	9	9	0	0	0
33	33	Westminster Communities of Florida	FL	4,155	2,852	522	781	13	10	3	0	0
34	26	National Church Residences	OH	1,607	861	521	225	9	3	3	3	0
35	32	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
36	35	Otterbein SeniorLife	OH	2,630	1,123	496	1,011	15	6	0	0	9
37	41	Eventide	MN	1,142	71	469	602	6	5	0	1	0
38	36	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
39	38	Shell Point Retirement Community	FL	2,204	1,406	449	349	2	2	0	0	0
40	40	Haverland Carter Lifestyle Group	NM	954	414	442	98	4	2	0	2	0
41	43	The Carmelite System, Inc.	NY	3,157	144	421	2,592	16	1	1	2	12
42	44	Christian Care Companies	AZ	2,399	1,911	420	68	7	0	6	0	1
43	45	Immanuel	NE	1,240	646	393	201	17	7	1	7	2
44	52	Methodist Retirement Communities	TX	1,316	629	393	294	7	5	1	1	0
45	39	Pinnacle Living	VA	1,121	514	393	214	5	5	0	0	0
46	46	Pacific Retirement Services, Inc.	OR	3,073	2,310	378	385	9	9	0	0	0
47	50	WesleyLife	IA	1,843	808	375	660	10	10	0	0	0
48	17	Providence Life Services	IL	1,421	767	372	282	7	1	4	1	1
49	47	Covenant Health	MA	1,636	0	364	1,272	12	0	0	3	9
50	48	Lutheran Life Communities	IL	1,551	408	360	783	6	4	0	0	2

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Total Assisted Living Units

2020 AL Rank	2019 AL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	42	Franciscan Communities, Inc.	IL	1,700	742	345	613	7	4	1	2	0
52	65	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	6	6	0	0	0
53	49	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
54	90	UMRC and Porter Hills	MI	1,199	678	335	186	6	3	2	1	0
55	51	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
56	54	Ebenezer Society	MN	567	0	320	247	8	0	0	5	3
57	55	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
58	61	Springpoint Senior Living Inc.	NJ	2,548	1,740	317	491	9	8	0	0	1
59	139	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
60	53	Presbyterian Communities of South Carolina	SC	1,001	411	316	274	6	6	0	0	0
61	85	Western Home Services	IA	1,184	587	314	283	5	2	2	0	1
62	58	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
63	59	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
64	60	Lutheran Homes of SC	SC	1,060	404	306	350	5	5	0	0	0
65	62	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
66	57	SpiriTrust Lutheran	PA	1,193	557	292	344	6	6	0	0	0
67	67	Homewood Retirement Centers Inc.	MD	1,873	1,134	288	451	5	5	0	0	0
68	63	Holland Home	MI	1,196	749	288	159	6	2	0	2	2
69	NR	St. Paul's Episcopal Home, Inc.	CA	481	135	287	59	4	0	1	2	1
70	89	LifeSpire of Virginia	VA	1,269	757	285	227	4	4	0	0	0
71	66	United Church Homes, Inc.	OH	1,491	448	273	770	11	5	2	0	4
72	68	United Methodist Homes	NY	1,088	389	273	426	4	3	1	0	0
73	70	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
74	80	Presbyterian Village of Michigan	MI	1,270	904	264	102	10	1	7	2	0
75	69	Sunset Senior Communities fka Sunset Retirement Communities & Serv.	MI	677	304	263	110	4	2	0	1	1

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Total Assisted Living Units

2020 AL Rank	2019 AL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	98	Christian Living Communities	CO	921	464	261	196	5	3	0	2	0
77	71	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,557	1,614	259	684	5	3	1	0	1
78	72	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
79	73	Lutheran Services Carolinas	NC	1,302	311	259	732	9	1	1	1	6
80	74	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
81	75	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
82	76	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
83	77	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
84	93	American Baptist Homes of the Midwest	MN	1,245	384	253	608	7	5	0	0	2
85	79	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
86	81	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
87	83	The Ohio Masonic Home	OH	787	377	246	164	3	2	0	1	0
88	97	Presbyterian Homes	IL	1,420	842	237	341	4	3	1	0	0
89	82	Living Branches	PA	839	459	237	143	3	2	0	1	0
90	64	The Wesley Communities fka Methodist ElderCare Services	OH	678	338	234	106	3	1	2	0	0
91	84	Christian Care Centers	TX	757	409	229	119	3	3	0	0	0
92	86	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
93	95	Benevolent Corporation Cedar Community	WI	746	409	227	110	8	0	3	4	1
94	104	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
95	88	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	2	2	0	0	0
96	91	Willow Valley Communities	PA	2,044	1,547	214	283	3	3	0	0	0
97	109	St. Andrew's Resources for Seniors System	MO	877	379	208	290	6	1	2	1	2
98	100	Lutheran SeniorLife	PA	1,123	489	192	442	5	2	3	0	0
99	102	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
100	106	Friendship Senior Options	IL	1,127	701	184	242	2	2	0	0	0

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Total Assisted Living Units

2020 AL Rank	2019 AL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	99	Front Porch Communities and Services	CA	2,860	2,159	183	518	10	5	5	0	0
102	103	Messiah Lifeways	PA	807	440	183	184	2	1	1	0	0
103	105	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	3	1	0	0	2
104	107	National Lutheran Communities & Services	MD	795	435	180	180	3	0	2	1	0
105	108	Knute Nelson	MN	484	211	180	93	6	0	2	3	1
106	110	Menno Haven, Inc.	PA	858	434	178	246	2	2	0	0	0
107	113	Genacross Lutheran Services	OH	598	138	175	285	4	2	1	0	1
108	114	Simpson Senior Servies	PA	802	454	170	178	3	3	0	0	0
109	112	Wesley Willows	IL	799	539	169	91	2	1	1	0	0
110	115	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
111	78	Clark Retirement Community, Inc.	MI	401	194	168	39	2	2	0	0	0
112	116	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
113	117	Council for Jewish Elderly	IL	441	36	165	240	3	0	1	1	1
114	126	Landis Communities	PA	811	548	160	103	3	1	1	1	0
115	119	Christian Care Communities	KY	930	365	160	405	7	5	1	1	0
116	120	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
117	179	Ingleside	MD	1,128	832	157	139	3	3	0	0	0
118	129	Sunnyside Presbyterian Home	VA	786	495	157	134	3	3	0	0	0
119	121	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
120	NR	Luther Manor	WI	633	325	156	152	2	1	0	1	0
121	122	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
122	123	Wesley	WA	930	592	154	184	3	2	1	0	0
123	124	Morningside Ministries	TX	707	343	154	210	2	2	0	0	0
124	125	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
125	96	Masonic Homes of Kentucky	KY	888	450	151	287	3	1	1	0	1

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Total Assisted Living Units

2020 AL Rank	2019 AL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	141	Saint Mary's Home of Erie	PA	393	26	148	219	6	1	1	2	2
127	127	Smith Senior Living	IL	658	322	144	192	2	2	0	0	0
128	130	Sholom	MN	568	154	142	272	5	0	1	2	2
129	143	CRISTA Senior Living	WA	624	374	141	109	2	2	0	0	0
130	132	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
131	133	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	4	1	2	0	1
132	134	Baptist Homes Society	PA	653	326	138	189	2	1	0	0	1
133	131	Baptist Retirement Homes of North Carolina Incorporated	NC	601	262	138	201	4	2	0	1	1
134	137	Life Enriching Communities	OH	811	532	135	144	2	2	0	0	0
135	136	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
136	138	Redstone Presbyterian SeniorCare	PA	516	305	134	77	7	0	3	3	1
137	139	SCBMA	SC	402	94	134	174	2	2	0	0	0
138	140	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	3	3	0	0	0
139	144	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
140	NR	Jewish Senior Life of Metropolitan Detroit	MI	420	290	130	0	4	0	2	2	0
141	145	Bethel	NY	563	170	130	263	5	1	1	1	2
142	146	Blue Skies of Texas	TX	1,001	728	129	144	2	2	0	0	0
143	147	LutherCare	PA	810	473	126	211	3	2	0	0	1
144	141	Saint Therese	MN	1,010	475	125	410	5	3	1	0	1
145	148	The RiverWoods Group	NH	834	623	124	87	3	3	0	0	0
146	149	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
147	150	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
148	151	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
149	152	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	3	3	0	0	0
150	153	Samaritas	MI	762	294	120	348	5	1	2	0	2

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

2020 AL Rank	2019 AL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	154	Hebrew SeniorLife	MA	1,592	659	119	814	4	2	1	0	1
152	155	Medford Leas	NJ	535	392	119	24	2	1	1	0	0
153	156	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
154	186	Sun Health Services fka Sun Health Senior Living LLC	AZ	866	637	114	115	3	3	0	0	0
155	158	Moorings Park	FL	731	511	114	106	2	2	0	0	0
156	118	Avinity fka Avinity Senior Living	MN	477	363	114	0	6	0	3	3	0
157	159	The United Methodist Retirement Homes, Inc.	NC	984	674	108	202	3	3	0	0	0
158	167	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
159	NR	Good Shepherd Communities	NY	383	194	105	84	2	2	0	0	0
160	160	Sequoia Living, Inc	CA	946	702	103	141	3	3	0	0	0
161	161	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
162	163	Colonial Senior Services, Inc	OH	411	182	101	128	3	3	0	0	0
163	135	Covia Communities	CA	1,352	954	100	298	5	5	0	0	0
164	162	Friends Homes, Inc.	NC	568	359	100	109	2	2	0	0	0
165	NR	Cornerstone Village	TN	378	176	99	103	2	1	0	1	0
166	165	Allegheny Lutheran Social Ministries	PA	451	203	96	152	3	3	0	0	0
167	164	Rockwood Retirement Communities	WA	528	368	95	65	2	2	0	0	0
168	NR	Valley View Retirement Community	PA	390	133	95	162	2	2	0	0	0
169	166	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
170	168	Givens Communities	NC	895	674	91	130	2	2	0	0	0
171	169	Maple Knoll Communities, Inc.	OH	686	388	91	207	2	2	0	0	0
172	170	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
173	171	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
174	172	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
175	173	Presbyterian Homes of Georgia	GA	501	117	89	295	5	2	3	0	0

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Total Assisted Living Units

2020 AL Rank	2019 AL Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	175	Friendship Villages of St. Louis	MO	987	691	88	208	2	2	0	0	0
177	174	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
178	177	Episcopal Communities & Services	CA	566	436	82	48	3	3	0	0	0
179	176	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
180	178	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
181	189	Parker Health Group, Inc.	NJ	427	0	80	347	5	0	0	1	4
182	180	Bethesda Health Group, Inc	MO	1,460	727	78	655	12	0	6	2	4
183	181	St. Ann's of Greater Rochester, Inc.	NY	914	297	75	542	3	2	1	0	0
184	183	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
185	184	Lutheran Social Ministries of Maryland	MD	823	639	69	115	2	2	0	0	0
186	157	Lutheran Life Villages	IN	524	135	65	324	3	1	0	0	2
187	185	Beechwood Health Care Center, Inc.	NY	447	110	65	272	3	0	1	1	1
188	187	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
189	188	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
190	192	Mather fka Mather LifeWays	IL	801	665	59	77	3	2	1	0	0
191	190	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
192	191	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
193	193	Friendly Senior Living	NY	554	298	56	200	4	0	2	1	1
194	194	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
195	195	St. John's	NY	916	403	38	475	4	0	1	1	2
196	196	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
197	197	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
198	198	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
199	199	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
200	200	A.G. Rhodes Health & Rehab	GA	418	0	0	418	3	0	0	0	3

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2020 NCB Rank	2019 NCB Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	The Evangelical Lutheran Good Samaritan Society	SD	15,507	4,795	2,110	8,602	142	53	8	9	72
2	2	Ascension Living	MO	8,129	2,124	1,203	4,802	48	2	5	3	38
3	3	Trinity Health Senior Communities	MI	5,715	1,839	1,199	2,677	54	6	13	14	21
4	4	The Carmelite System, Inc.	NY	3,157	144	421	2,592	16	1	1	2	12
5	5	Benedictine fka Benedictine Health System	MN	4,394	726	1,496	2,172	33	25	1	4	3
6	6	Cassia	MN	3,920	522	1,512	1,886	51	0	5	28	18
7	8	Acts Retirement Services, Inc.	PA	9,592	6,737	1,118	1,737	26	26	0	0	0
8	7	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
9	9	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
10	10	Presbyterian Homes and Services	MN	7,958	4,118	2,389	1,451	46	15	28	0	3
11	11	Covenant Health	MA	1,636	0	364	1,272	12	0	0	3	9
12	12	National Senior Campuses	MA	20,917	18,136	1,628	1,153	16	16	0	0	0
13	14	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	20	12	6	2	0
14	13	Lutheran Senior Services	MO	3,541	1,678	744	1,119	11	8	0	1	2
15	21	HumanGood	CA	5,474	3,351	1,093	1,030	21	20	1	0	0
16	15	Otterbein SeniorLife	OH	2,630	1,123	496	1,011	15	6	0	0	9
17	16	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
18	17	Ohio Living	OH	3,286	1,732	567	987	13	13	0	0	0
19	23	Lifespace Communities Inc.	IA	5,179	3,663	535	981	15	15	0	0	0
20	19	Covenant Living Communities & Services	IL	5,228	3,363	884	981	18	13	2	2	1
21	18	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	9	9	0	0	0
22	20	Loretto	NY	1,684	210	551	923	9	1	2	4	2
23	31	Asbury Communities, Inc.	MD	3,591	2,147	535	909	8	8	0	0	0
24	24	Hebrew SeniorLife	MA	1,592	659	119	814	4	2	1	0	1
25	25	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2020 NCB Rank	2019 NCB Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	26	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
27	27	Lutheran Life Communities	IL	1,551	408	360	783	6	4	0	0	2
28	28	Westminster Communities of Florida	FL	4,155	2,852	522	781	13	10	3	0	0
29	22	Presbyterian Manors of Mid-America, Inc.	KS	2,247	908	563	776	16	15	0	1	0
30	30	United Church Homes, Inc.	OH	1,491	448	273	770	11	5	2	0	4
31	32	Lutheran Services Carolinas	NC	1,302	311	259	732	9	1	1	1	6
32	35	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,557	1,614	259	684	5	3	1	0	1
33	33	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
34	36	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
35	37	Concordia Lutheran Ministries	PA	2,806	996	1,147	663	14	6	0	6	2
36	51	WesleyLife	IA	1,843	808	375	660	10	10	0	0	0
37	41	Bethesda Health Group, Inc	MO	1,460	727	78	655	12	0	6	2	4
38	29	Franciscan Communities, Inc.	IL	1,700	742	345	613	7	4	1	2	0
39	39	Retirement Housing Foundation	CA	4,098	2,646	841	611	18	9	8	1	0
40	40	Greencroft Communities	IN	1,842	646	586	610	9	7	0	2	0
41	38	American Baptist Homes of the Midwest	MN	1,245	384	253	608	7	5	0	0	2
42	42	Eventide	MN	1,142	71	469	602	6	5	0	1	0
43	43	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
44	44	St. Ann's of Greater Rochester, Inc.	NY	914	297	75	542	3	2	1	0	0
45	45	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
46	46	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
47	47	Front Porch Communities and Services	CA	2,860	2,159	183	518	10	5	5	0	0
48	48	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
49	49	The Kendal Corporation	PA	3,629	2,512	609	508	15	13	2	0	0
50	50	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2020 NCB Rank	2019 NCB Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	52	Springpoint Senior Living Inc.	NJ	2,548	1,740	317	491	9	8	0	0	1
52	53	St. John's	NY	916	403	38	475	4	0	1	1	2
53	54	Homewood Retirement Centers Inc.	MD	1,873	1,134	288	451	5	5	0	0	0
54	55	Lutheran SeniorLife	PA	1,123	489	192	442	5	2	3	0	0
55	59	Eskaton	CA	1,507	393	688	426	12	1	1	7	3
56	162	United Methodist Homes	NY	1,088	389	273	426	4	3	1	0	0
57	60	A.G. Rhodes Health & Rehab	GA	418	0	0	418	3	0	0	0	3
58	61	Saint Therese	MN	1,010	475	125	410	5	3	1	0	1
59	62	Christian Care Communities	KY	930	365	160	405	7	5	1	1	0
60	63	Pacific Retirement Services, Inc.	OR	3,073	2,310	378	385	9	9	0	0	0
61	65	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
62	66	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
63	67	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
64	69	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
65	82	BHI Senior Living Inc	IN	1,517	472	693	352	5	5	0	0	0
66	70	Lutheran Homes of SC	SC	1,060	404	306	350	5	5	0	0	0
67	79	Shell Point Retirement Community	FL	2,204	1,406	449	349	2	2	0	0	0
68	71	Samaritas	MI	762	294	120	348	5	1	2	0	2
69	73	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
70	74	Parker Health Group, Inc.	NJ	427	0	80	347	5	0	0	1	4
71	75	SpiriTrust Lutheran	PA	1,193	557	292	344	6	6	0	0	0
72	76	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
73	68	Presbyterian Homes	IL	1,420	842	237	341	4	3	1	0	0
74	77	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
75	80	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2020 NCB Rank	2019 NCB Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	72	Walker Methodist	MN	1,075	0	748	327	9	0	0	8	1
77	87	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	6	6	0	0	0
78	81	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
79	58	Lutheran Life Villages	IN	524	135	65	324	3	1	0	0	2
80	83	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
81	84	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	3	1	0	0	2
82	64	Covia Communities	CA	1,352	954	100	298	5	5	0	0	0
83	85	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
84	86	Presbyterian Homes of Georgia	GA	501	117	89	295	5	2	3	0	0
85	103	Methodist Retirement Communities	TX	1,316	629	393	294	7	5	1	1	0
86	92	St. Andrew's Resources for Seniors System	MO	877	379	208	290	6	1	2	1	2
87	107	Masonic Homes of Kentucky	KY	888	450	151	287	3	1	1	0	1
88	89	Genacross Lutheran Services	OH	598	138	175	285	4	2	1	0	1
89	90	Willow Valley Communities	PA	2,044	1,547	214	283	3	3	0	0	0
90	128	Western Home Services	IA	1,184	587	314	283	5	2	2	0	1
91	198	Providence Life Services	IL	1,421	767	372	282	7	1	4	1	1
92	93	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
93	95	Presbyterian Communities of South Carolina	SC	1,001	411	316	274	6	6	0	0	0
94	96	Sholom	MN	568	154	142	272	5	0	1	2	2
95	97	Beechwood Health Care Center, Inc.	NY	447	110	65	272	3	0	1	1	1
96	98	Bethel	NY	563	170	130	263	5	1	1	1	2
97	100	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
98	104	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
99	105	United Methodist Communities	NJ	878	88	542	248	4	1	0	3	0
100	102	Ebenezer Society	MN	567	0	320	247	8	0	0	5	3

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2020 NCB Rank	2019 NCB Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	101	Menno Haven, Inc.	PA	858	434	178	246	2	2	0	0	0
102	106	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
103	91	Friendship Senior Options	IL	1,127	701	184	242	2	2	0	0	0
104	108	Council for Jewish Elderly	IL	441	36	165	240	3	0	1	1	1
105	115	LifeSpire of Virginia	VA	1,269	757	285	227	4	4	0	0	0
106	110	National Church Residences	OH	1,607	861	521	225	9	3	3	3	0
107	112	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
108	NR	Saint Mary's Home of Erie	PA	393	26	148	219	6	1	1	2	2
109	113	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
110	114	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
111	109	Pinnacle Living	VA	1,121	514	393	214	5	5	0	0	0
112	116	LutherCare	PA	810	473	126	211	3	2	0	0	1
113	117	Morningside Ministries	TX	707	343	154	210	2	2	0	0	0
114	119	Friendship Villages of St. Louis	MO	987	691	88	208	2	2	0	0	0
115	121	Maple Knoll Communities, Inc.	OH	686	388	91	207	2	2	0	0	0
116	120	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
117	122	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
118	123	The United Methodist Retirement Homes, Inc.	NC	984	674	108	202	3	3	0	0	0
119	111	Immanuel	NE	1,240	646	393	201	17	7	1	7	2
120	124	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	3	3	0	0	0
121	118	Baptist Retirement Homes of North Carolina Incorporated	NC	601	262	138	201	4	2	0	1	1
122	125	Friendly Senior Living	NY	554	298	56	200	4	0	2	1	1
123	126	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
124	127	Christian Living Communities	CO	921	464	261	196	5	3	0	2	0
125	129	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2020 NCB Rank	2019 NCB Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	147	Smith Senior Living	IL	658	322	144	192	2	2	0	0	0
127	131	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	3	3	0	0	0
128	130	Baptist Homes Society	PA	653	326	138	189	2	1	0	0	1
129	182	UMRC and Porter Hills	MI	1,199	678	335	186	6	3	2	1	0
130	132	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
131	134	Wesley	WA	930	592	154	184	3	2	1	0	0
132	133	Messiah Lifeways	PA	807	440	183	184	2	1	1	0	0
133	135	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
134	136	National Lutheran Communities & Services	MD	795	435	180	180	3	0	2	1	0
135	137	Simpson Senior Servies	PA	802	454	170	178	3	3	0	0	0
136	138	SCBMA	SC	402	94	134	174	2	2	0	0	0
137	139	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	4	1	2	0	1
138	141	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
139	142	The Ohio Masonic Home	OH	787	377	246	164	3	2	0	1	0
140	NR	Valley View Retirement Community	PA	390	133	95	162	2	2	0	0	0
141	143	Holland Home	MI	1,196	749	288	159	6	2	0	2	2
142	NR	Luther Manor	WI	633	325	156	152	2	1	0	1	0
143	144	Allegheny Lutheran Social Ministries	PA	451	203	96	152	3	3	0	0	0
144	145	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
145	146	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
146	159	Blue Skies of Texas	TX	1,001	728	129	144	2	2	0	0	0
147	148	Life Enriching Communities	OH	811	532	135	144	2	2	0	0	0
148	149	Living Branches	PA	839	459	237	143	3	2	0	1	0
149	150	Sequoia Living, Inc	CA	946	702	103	141	3	3	0	0	0
150	154	Ingleside	MD	1,128	832	157	139	3	3	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

2020 NCB Rank	2019 NCB Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	151	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
152	152	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
153	153	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
154	155	Sunnyside Presbyterian Home	VA	786	495	157	134	3	3	0	0	0
155	156	Givens Communities	NC	895	674	91	130	2	2	0	0	0
156	157	Colonial Senior Services, Inc	OH	411	182	101	128	3	3	0	0	0
157	161	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
158	163	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
159	57	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
160	164	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
161	158	Christian Care Centers	TX	757	409	229	119	3	3	0	0	0
162	165	Lutheran Social Ministries of Maryland	MD	823	639	69	115	2	2	0	0	0
163	166	Sun Health Services fka Sun Health Senior Living LLC	AZ	866	637	114	115	3	3	0	0	0
164	167	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
165	169	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	2	2	0	0	0
166	160	Benevolent Corporation Cedar Community	WI	746	409	227	110	8	0	3	4	1
167	168	Sunset Senior Communities fka Sunset Retirement Communities & Serv.	MI	677	304	263	110	4	2	0	1	1
168	140	CRISTA Senior Living	WA	624	374	141	109	2	2	0	0	0
169	170	Friends Homes, Inc.	NC	568	359	100	109	2	2	0	0	0
170	172	Moorings Park	FL	731	511	114	106	2	2	0	0	0
171	171	The Wesley Communities fka Methodist ElderCare Services	OH	678	338	234	106	3	1	2	0	0
172	174	Landis Communities	PA	811	548	160	103	3	1	1	1	0
173	NR	Cornerstone Village	TN	378	176	99	103	2	1	0	1	0
174	175	Presbyterian Village of Michigan	MI	1,270	904	264	102	10	1	7	2	0
175	177	Haverland Carter Lifestyle Group	NM	954	414	442	98	4	2	0	2	0

The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2020 NCB Rank	2019 NCB Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	178	Knute Nelson	MN	484	211	180	93	6	0	2	3	1
177	179	Wesley Willows	IL	799	539	169	91	2	1	1	0	0
178	173	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
179	180	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
180	181	The RiverWoods Group	NH	834	623	124	87	3	3	0	0	0
181	183	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
182	NR	Good Shepherd Communities	NY	383	194	105	84	2	2	0	0	0
183	184	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
184	186	Mather fka Mather LifeWays	IL	801	665	59	77	3	2	1	0	0
185	185	Redstone Presbyterian SeniorCare	PA	516	305	134	77	7	0	3	3	1
186	187	Christian Care Companies	AZ	2,399	1,911	420	68	7	0	6	0	1
187	188	Rockwood Retirement Communities	WA	528	368	95	65	2	2	0	0	0
188	190	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
189	NR	St. Paul's Episcopal Home, Inc.	CA	481	135	287	59	4	0	1	2	1
190	191	Episcopal Communities & Services	CA	566	436	82	48	3	3	0	0	0
191	192	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
192	193	Clark Retirement Community, Inc.	MI	401	194	168	39	2	2	0	0	0
193	194	Medford Leas	NJ	535	392	119	24	2	1	1	0	0
194	195	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
195	189	Transforming Age	WA	1,848	1,097	751	0	14	3	7	4	0
196	200	Avinity fka Avinity Senior Living	MN	477	363	114	0	6	0	3	3	0
197	NR	Jewish Senior Life of Metropolitan Detroit	MI	420	290	130	0	4	0	2	2	0
198	196	Bethesda Senior Living Communities	CO	1,762	111	1,651	0	18	0	2	16	0
199	199	Vista Prairie Communities	MN	736	100	636	0	8	0	0	8	0
200	197	Baruch fka Baruch Senior Ministries	MI	957	2	955	0	24	0	0	24	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 (371 to 137 Total Units)

ACC Senior Service (CA)

Bethany Life (IA)

Bethesda fka Bethesda Health & Housing (MN)

Crest View Senior Communities (MN)

Grace Lutheran Foundation, Inc. (WI)

Los Angeles Jewish Home (CA)

Masonic Homes of California (CA)

Miravida (WI)

Morningstar Senior Living, Inc. (PA)

Resthaven (MI)

Silverstone Living (NH)

Sunset Retirement Communities, Inc. (OH)

Three Pillars Senior Living Communities (WI)

Woodhaven Retirement Community (MI)

WRC Senior Services (PA)

The Rankings: Change at a Glance

Greatest Changes in Units

Greatest Increase and Decrease	State	YE 2019 Units	YE 2018 Units	Change
Greatest Increase				
Acts Retirement Services, Inc.	PA	9,592	8,626	+966
Lifespace Communities	IA	5,179	4,561	+618
HumanGood	CA	5,474	4,901	+573
Covenant Living Communities & Services	IL	5,228	4,714	+514
National Senior Campuses	MA	20,917	20,513	+404
Greatest Decrease				
The Evangelical Lutheran Good Samaritan Society	SD	15,507	16,557	-1,050
Trinity Health Senior Communities	MI	5,715	6,377	-662
Franciscan Communities	IL	1,700	1,945	-245
Covia Communities	CA	1,352	1,589	-237
Providence Life Services	IL	1,421	1,526	-105

The Rankings: Change at a Glance

Greatest Changes in Rank

Greatest Upward and Downward Change	State	2020 Rank	2019 Rank	Change
Greatest Upward Movement				
UMRC and Porter Hills	MI	68	151	+83
Ingleside	MD	74	111	+37
The RiverWoods Group	NH	109	131	+22
Western Home Services	IA	71	92	+21
Landis Communities	PA	111	129	+18
Greatest Downward Movement				
Covia Communities	CA	57	47	-10
Friendship Senior Options	IL	75	66	-9
Pinnacle Living	VA	77	70	-7
Providence Life Services	IL	55	49	-5
Franciscan Communities	IL	40	35	-5



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 three 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 2020 LZ 200 provides a side-by-side comparison of the unit mix for 2019 compared to 2018 for each of the organizations. The 2020 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 roughly 60% of the total units. The 10 largest systems own

nearly 30% of the total LZ 200 units. The average system within the 2020 LZ 200 reported more than 1,513 units in 2019 (*Chart 4-1b*). Nearly 45% of the 2020 LZ 200's total communities are Life Plan Communities, with the remaining 56% 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 12/31/19. The second set of columns show the unit mix as of 12/31/18.

Change in Total Units from 2018 to 2019. This column provides the change in the listed organization's TOTAL market-rate units (all levels of care) between year-end 2019 and year-end 2018.

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 three years' listings (e.g., the unit



mix of the 2016 LZ 150 compared to the unit mix of the 2017 LZ 150 and the unit mix of the 2019 LZ 200, compared to the unit mix of the 2020 LZ 200). 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, 2015, 2016, 2017, 2018, and 2019 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 2020 LZ 200 for 2019 compared to their portfolios at the end of 2018.

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 6). The first set of columns in Chart 4-2a shows the communities owned, by type, as of 12/31/19. The second set of columns shows the communities owned, by type, as of 12/31/18.

Change in Total Communities from 2018 to 2019. This column provides the change in the listed organization's TOTAL communities (all types, excluding affordable housing) between year-end 2018 and year-end 2019. 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 three years' LZ 150 listings (e.g., the types of communities owned by the 2016 LZ 150, and 2017 LZ 150 compared to types of communities owned by the 2019 LZ 200, compared to the types of communities owned by the 2020 LZ 200). 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 (2019 vs. 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2018 to 2019
				2019 Units				2018 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	1	National Senior Campuses	MA	20,917	18,136	1,628	1,153	20,513	17,764	1,556	1,193	404
2	2	The Evangelical Lutheran Good Samaritan Society	SD	15,507	4,795	2,110	8,602	16,557	5,038	2,179	9,340	-1,050
3	3	ACTS Retirement Services, Inc.	PA	9,592	6,737	1,118	1,737	8,626	6,121	980	1,525	966
4	5	Ascension Living	MO	8,129	2,124	1,203	4,802	7,722	1,957	1,203	4,562	407
5	4	Presbyterian Homes and Services	MN	7,958	4,118	2,389	1,451	7,824	3,994	2,352	1,478	134
6	6	Trinity Health Senior Communities	MI	5,715	1,839	1,199	2,677	6,377	2,228	1,102	3,047	-662
7	8	HumanGood	CA	5,474	3,351	1,093	1,030	4,714	2,911	887	916	760
8	7	Covenant Living Communities & Services	IL	5,228	3,363	884	981	4,901	3,116	842	943	327
9	11	Lifespace Communities Inc.	IA	5,179	3,663	535	981	4,014	3,011	174	829	1,165
10	9	Benedictine fka Benedictine Health System	MN	4,394	726	1,496	2,172	4,561	720	1,398	2,443	-167
11	12	Westminster Communities of Florida	FL	4,155	2,852	522	781	3,934	2,642	511	781	221
12	10	Retirement Housing Foundation	CA	4,098	2,646	841	611	4,097	2,645	841	611	1
13	13	Cassia	MN	3,920	522	1,512	1,886	3,920	522	1,512	1,886	0
14	14	The Kendal Corporation	PA	3,629	2,512	609	508	3,640	2,516	612	512	-11
15	15	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	3,601	1,920	547	1,134	0
16	17	Asbury Communities, Inc.	MD	3,591	2,147	535	909	3,353	2,120	501	732	238
17	16	Lutheran Senior Services	MO	3,541	1,678	744	1,119	3,560	1,679	744	1,137	-19
18	18	Ohio Living	OH	3,286	1,732	567	987	3,309	1,747	575	987	-23
19	19	The Carmelite System, Inc.	NY	3,157	144	421	2,592	3,129	144	421	2,564	28
20	20	Pacific Retirement Services, Inc.	OR	3,073	2,310	378	385	3,084	2,311	380	393	-11
21	21	Front Porch Communities and Services	CA	2,860	2,159	183	518	2,819	2,108	193	518	41
22	22	Concordia Lutheran Ministries	PA	2,806	996	1,147	663	2,712	912	1,137	663	94
23	23	Otterbein SeniorLife	OH	2,630	1,123	496	1,011	2,626	1,123	476	1,027	4
24	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,557	1,614	259	684	2,509	1,566	259	684	48
25	24	Springpoint Senior Living Inc.	NJ	2,548	1,740	317	491	2,546	1,753	302	491	2

Organizational Characteristics: Units Rank Detailed by Units (2019 vs. 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2018 to 2019
				2019 Units				2018 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	26	Volunteers of America	VA	2,484	604	873	1,007	2,480	595	868	1,017	4
27	27	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	2,410	918	531	961	0
28	28	Christian Care Companies	AZ	2,399	1,911	420	68	2,399	1,911	420	68	0
29	29	Presbyterian Manors of Mid-America, Inc.	KS	2,247	908	563	776	2,325	920	563	842	-78
30	30	Shell Point Retirement Community	FL	2,204	1,406	449	349	2,183	1,406	449	328	21
31	31	Christian Horizons	MO	2,181	383	312	1,486	2,181	383	312	1,486	0
32	33	Ecumen	MN	2,109	376	1,391	342	2,109	376	1,391	342	0
33	34	Willow Valley Communities	PA	2,044	1,547	214	283	2,049	1,552	214	283	-5
34	36	Homewood Retirement Centers Inc.	MD	1,873	1,134	288	451	1,838	1,115	272	451	35
35	38	Transforming Age	WA	1,848	1,097	751	0	1,817	1,177	578	62	31
36	44	WesleyLife	IA	1,843	808	375	660	1,594	765	338	491	249
37	37	Greencroft Communities	IN	1,842	646	586	610	1,837	639	588	610	5
38	39	ArchCare	NY	1,782	0	59	1,723	1,782	0	59	1,723	0
39	43	Bethesda Senior Living Communities	CO	1,762	111	1,651	0	1,621	155	1,466	0	141
40	35	Franciscan Communities, Inc.	IL	1,700	742	345	613	1,945	739	436	770	-245
41	55	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	1,398	829	280	289	290
42	40	Loretto	NY	1,684	210	551	923	1,684	210	551	923	0
43	42	Covenant Health	MA	1,636	0	364	1,272	1,636	0	364	1,272	0
44	41	National Church Residences	OH	1,607	861	521	225	1,649	851	566	232	-42
45	45	Hebrew SeniorLife	MA	1,592	659	119	814	1,592	659	119	814	0
46	46	Presbyterian SeniorCare Network	PA	1,591	396	520	675	1,591	396	520	675	0
47	48	Lutheran Life Communities	IL	1,551	408	360	783	1,551	408	360	783	0
48	50	Baptist Village Communities	OK	1,521	939	257	325	1,521	939	257	325	0
49	64	BHI Senior Living Inc	IN	1,517	472	693	352	1,220	289	611	320	297
50	51	Eskaton	CA	1,507	393	688	426	1,506	392	688	426	1

Organizational Characteristics: Units Rank Detailed by Units (2019 vs. 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2018 to 2019
				2019 Units				2018 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	57	United Church Homes, Inc.	OH	1,491	448	273	770	1,381	336	275	770	110
52	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	1,483	339	335	809	0
53	56	Bethesda Health Group, Inc	MO	1,460	727	78	655	1,396	733	78	585	64
54	53	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	1,446	788	338	320	0
55	49	Providence Life Services	IL	1,421	767	372	282	1,526	725	801	0	-105
56	54	Presbyterian Homes	IL	1,420	842	237	341	1,411	854	196	361	9
57	47	Covia Communities	CA	1,352	954	100	298	1,589	1,076	137	376	-237
58	58	Masonicare	CT	1,326	651	309	366	1,326	651	309	366	0
59	76	Methodist Retirement Communities	TX	1,316	629	393	294	1,088	504	331	253	228
60	59	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	1,306	876	316	114	0
61	60	Lutheran Services Carolinas	NC	1,302	311	259	732	1,302	311	259	732	0
62	61	Presbyterian Village of Michigan	MI	1,270	904	264	102	1,270	917	251	102	0
63	71	LifeSpire of Virginia	VA	1,269	757	285	227	1,171	735	219	217	98
64	68	Heritage Ministries	NY	1,268	363	221	684	1,195	293	183	719	73
65	67	American Baptist Homes of the Midwest	MN	1,245	384	253	608	1,200	374	209	617	45
66	62	Immanuel	NE	1,240	646	393	201	1,268	645	393	230	-28
67	63	Wesley Enhanced Living	PA	1,235	629	246	360	1,235	629	246	360	0
68	151	UMRC and Porter Hills	MI	1,199	678	335	186	1,202	668	348	186	-3
69	69	Holland Home	MI	1,196	749	288	159	1,184	737	288	159	12
70	65	SpiriTrust Lutheran	PA	1,193	557	292	344	1,216	557	315	344	-23
71	92	Western Home Services	IA	1,184	587	314	283	950	526	229	195	234
72	72	Phoebe Ministries	PA	1,163	370	259	534	1,163	370	259	534	0
73	78	Eventide	MN	1,142	71	469	602	1,067	71	442	554	75
74	111	Ingleside	MD	1,128	832	157	139	820	606	79	135	308
75	66	Friendship Senior Options	IL	1,127	701	184	242	1,215	751	181	283	-88

Organizational Characteristics: Units Rank Detailed by Units (2019 vs. 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2018 to 2019
				2019 Units				2018 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	75	Lutheran SeniorLife	PA	1,123	489	192	442	1,123	489	192	442	0
77	70	Pinnacle Living	VA	1,121	514	393	214	1,175	493	443	239	-54
78	79	United Methodist Homes	NY	1,088	389	273	426	1,066	364	271	431	22
79	73	Walker Methodist	MN	1,075	0	748	327	1,140	579	212	349	-65
80	77	Lutheran Homes of SC	SC	1,060	404	306	350	1,074	410	307	357	-14
81	87	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	970	648	133	189	58
82	81	Saint Therese	MN	1,010	475	125	410	1,009	466	133	410	1
83	85	Blue Skies of Texas	TX	1,001	728	129	144	980	724	129	127	21
84	80	Presbyterian Communities of South Carolina	SC	1,001	411	316	274	1,015	412	329	274	-14
85	83	Felician Services, Inc.	IL	990	177	268	545	990	177	268	545	0
86	84	Friendship Villages of St. Louis	MO	987	691	88	208	982	691	83	208	5
87	94	The United Methodist Retirement Homes, Inc.	NC	984	674	108	202	943	633	108	202	41
88	86	Liberty Lutheran Services	PA	972	437	318	217	972	437	318	217	0
89	88	Baruch fka Baruch Senior Ministries	MI	957	2	955	0	957	2	955	0	0
90	89	Haverland Carter Lifestyle Group	NM	954	414	442	98	954	414	442	98	0
91	90	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	953	621	220	112	0
92	91	United Church Homes and Services	NC	953	535	90	328	953	535	90	328	0
93	93	Sequoia Living, Inc	CA	946	702	103	141	946	702	103	141	0
94	95	Wesley	WA	930	592	154	184	930	592	154	184	0
95	96	Christian Care Communities	KY	930	365	160	405	930	365	160	405	0
96	105	Christian Living Communities	CO	921	464	261	196	855	464	195	196	66
97	99	St. John's	NY	916	403	38	475	916	403	38	475	0
98	104	St. Ann's of Greater Rochester, Inc.	NY	914	297	75	542	863	246	75	542	51
99	102	Givens Communities	NC	895	674	91	130	894	673	91	130	1
100	101	Masonic Homes of Kentucky	KY	888	450	151	287	895	450	201	244	-7

Organizational Characteristics: Units Rank Detailed by Units (2019 vs. 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2018 to 2019
				2019 Units				2018 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
101	103	United Methodist Communities	NJ	878	88	542	248	878	88	542	248	0
102	108	St. Andrew's Resources for Seniors System	MO	877	379	208	290	839	379	179	281	38
103	112	Sun Health Services fka Sun Health Senior Living LLC	AZ	866	637	114	115	813	634	64	115	53
104	97	Menno Haven, Inc.	PA	858	434	178	246	918	484	178	256	-60
105	106	Goodwin House Incorporated	VA	850	580	121	149	850	580	121	149	0
106	107	Living Branches	PA	839	459	237	143	849	460	246	143	-10
107	109	The New Jewish Home	NY	838	24	0	814	838	24	0	814	0
108	131	The RiverWoods Group	NH	834	623	124	87	742	531	124	87	92
109	110	Lutheran Social Ministries of Maryland	MD	823	639	69	115	823	639	69	115	0
110	129	Landis Communities	PA	811	548	160	103	748	496	149	103	63
111	116	Life Enriching Communities	OH	811	532	135	144	800	522	134	144	11
112	113	LutherCare	PA	810	473	126	211	810	473	126	211	0
113	114	Messiah Lifeways	PA	807	440	183	184	806	439	183	184	1
114	115	Simpson Senior Servies	PA	802	454	170	178	802	454	170	178	0
115	117	Mather fka Mather LifeWays	IL	801	665	59	77	798	665	56	77	3
116	118	Wesley Willows	IL	799	539	169	91	798	536	171	91	1
117	119	National Lutheran Communities & Services	MD	795	435	180	180	795	435	180	180	0
118	120	The Ohio Masonic Home	OH	787	377	246	164	788	378	246	164	-1
119	122	Sunnyside Presbyterian Home	VA	786	495	157	134	772	496	142	134	14
120	121	Garden Spot Communities	PA	774	569	86	119	774	569	86	119	0
121	123	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	771	229	44	498	0
122	124	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	769	277	182	310	0
123	127	Grace Inspired Ministries	PA	767	451	151	165	767	451	151	165	0
124	128	United Church of Christ Homes	PA	766	267	124	375	766	267	124	375	0
125	126	Samaritas	MI	762	294	120	348	768	294	120	354	-6

Organizational Characteristics: Units Rank Detailed by Units (2019 vs. 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2018 to 2019
				2019 Units				2018 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
126	125	Christian Care Centers	TX	757	409	229	119	768	409	232	127	-11
127	130	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	747	425	121	201	0
128	132	Benevolent Corporation Cedar Community	WI	746	409	227	110	740	411	203	126	6
129	133	Vista Prairie Communities	MN	736	100	636	0	736	100	636	0	0
130	134	Moorings Park	FL	731	511	114	106	731	511	114	106	0
131	136	Emerald Communities	WA	725	527	107	91	725	527	92	106	0
132	137	Morningside Ministries	TX	707	343	154	210	707	343	154	210	0
133	138	Christian Health Care Center	NJ	707	329	80	298	707	329	80	298	0
134	139	United Methodist Memorial Home	IN	699	188	255	256	699	188	255	256	0
135	141	Maple Knoll Communities, Inc.	OH	686	388	91	207	686	388	91	207	0
136	135	The Wesley Communities fka Methodist ElderCare Services	OH	678	338	234	106	726	337	283	106	-48
137	142	Sunset Senior Communities fka Sunset Retirement Communities	MI	677	304	263	110	681	299	268	114	-4
138	144	Vincentian Collaborative Services	PA	675	66	82	527	675	66	82	527	0
139	145	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	674	369	138	167	0
140	154	Smith Senior Living	IL	658	322	144	192	612	322	144	146	46
141	146	Elder Care Alliance	CA	658	135	464	59	658	135	464	59	0
142	159	Baptist Homes Society	PA	653	326	138	189	584	257	138	189	69
143	148	Episcopal SeniorLife Communities	NY	647	334	131	182	647	334	131	182	0
144	149	Community Wellness Partners, Inc.	NY	640	124	0	516	640	124	0	516	0
145	150	Wellspring Lutheran Services	MI	635	125	169	341	635	125	169	341	0
146	NR	Luther Manor	WI	633	325	156	152	633	325	156	152	0
147	143	CRISTA Senior Living	WA	624	374	141	109	680	382	131	167	-56
148	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	623	3	256	364	0
149	153	Baptist Retirement Homes of North Carolina Incorporated	NC	601	262	138	201	621	272	140	209	-20
150	155	Deaconess Abundant Life Communities	MA	598	377	138	83	598	377	138	83	0

NR: Not Ranked in that year

Organizational Characteristics: Units Rank Detailed by Units (2019 vs. 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2018 to 2019
				2019 Units				2018 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
151	156	Genacross Lutheran Services	OH	598	138	175	285	598	142	171	285	0
152	157	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	588	145	257	186	0
153	158	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	587	238	229	120	0
154	160	Episcopal Retirement Services	OH	576	267	115	194	576	267	115	194	0
155	162	Friends Homes, Inc.	NC	568	359	100	109	573	364	100	109	-5
156	164	Sholom	MN	568	154	142	272	568	154	142	272	0
157	165	Havenwood Heritage Heights	NH	567	367	63	137	567	367	63	137	0
158	161	Ebenezer Society	MN	567	0	320	247	575	0	320	255	-8
159	166	Episcopal Communities & Services	CA	566	436	82	48	564	436	80	48	2
160	167	Bethel	NY	563	170	130	263	563	170	130	263	0
161	168	Christian Village Communities	OH	559	221	190	148	559	221	190	148	0
162	169	Friendly Senior Living	NY	554	298	56	200	554	298	56	200	0
163	170	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	545	170	252	123	0
164	171	Church Homes, Inc.	CT	542	319	24	199	542	319	24	199	0
165	172	Cardinal Ritter Senior Services	MO	541	205	90	246	541	205	90	246	0
166	173	Medford Leas	NJ	535	392	119	24	536	393	119	24	-1
167	175	EHM Senior Solutions	MI	529	112	70	347	529	112	70	347	0
168	174	Rockwood Retirement Communities	WA	528	368	95	65	529	365	99	65	-1
169	176	The Lutheran Home Association	WI	525	161	157	207	525	161	157	207	0
170	140	Lutheran Life Villages	IN	524	135	65	324	524	135	65	324	0
171	177	Redstone Presbyterian SeniorCare	PA	516	305	134	77	507	296	134	77	9
172	178	United Methodist Homes	CT	507	90	297	120	507	90	297	120	0
173	180	Presbyterian Homes of Georgia	GA	501	117	89	295	501	117	89	295	0
174	181	Judson Services, Inc.	OH	500	227	135	138	500	227	135	138	0
175	182	Bethany St. Joseph Corporation	WI	497	135	158	204	497	135	158	204	0

Organizational Characteristics: Units Rank Detailed by Units (2019 vs. 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2018 to 2019
				2019 Units				2018 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
176	183	The Eliza Jennings Senior Care Network	OH	486	175	89	222	486	175	89	222	0
177	184	Knute Nelson	MN	484	211	180	93	484	211	180	93	0
178	NR	St. Paul's Episcopal Home, Inc.	CA	481	135	287	59	481	135	287	59	0
179	185	United Methodist Services for the Aging	PA	480	173	168	139	480	173	168	139	0
180	179	Avinity fka Avinity Senior Living	MN	477	363	114	0	505	341	164	0	-28
181	186	Wesley Woods Senior Living	GA	477	361	93	23	477	361	93	23	0
182	187	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	466	185	0	281	0
183	188	The Loomis Communities	MA	459	359	58	42	459	359	58	42	0
184	189	Allegheny Lutheran Social Ministries	PA	451	203	96	152	451	203	96	152	0
185	190	Beechwood Health Care Center, Inc.	NY	447	110	65	272	447	110	65	272	0
186	191	Michigan Masonic Homes	MI	442	38	155	249	442	38	155	249	0
187	192	Council for Jewish Elderly	IL	441	36	165	240	441	36	165	240	0
188	193	Willow Brook Christian Communities	OH	437	230	123	84	437	230	123	84	0
189	194	Baptist Life Communities	KY	428	150	60	218	428	150	60	218	0
190	197	Parker Health Group, Inc.	NJ	427	0	80	347	407	0	60	347	20
191	195	Skaalen Retirement Services	WI	421	229	101	91	421	229	101	91	0
192	NR	Jewish Senior Life of Metropolitan Detroit	MI	420	290	130	0	422	289	129	0	-2
193	196	A.G. Rhodes Health & Rehab	GA	418	0	0	418	418	0	0	418	0
194	198	Colonial Senior Services, Inc	OH	411	182	101	128	403	175	100	128	8
195	200	SCBMA	SC	402	94	134	174	402	94	134	174	0
196	199	Clark Retirement Community, Inc.	MI	401	194	168	39	402	110	253	39	-1
197	NR	Saint Mary's Home of Erie	PA	393	26	148	219	393	26	148	219	0
198	NR	Valley View Retirement Community	PA	390	133	95	162	390	133	95	162	0
199	NR	Good Shepherd Communities	NY	383	194	105	84	383	194	105	84	0
200	NR	Cornerstone Village	TN	378	176	99	103	378	176	99	103	0
		TOTAL UNITS		302,693	148,165	63,914	90,614	298,034	145,072	62,024	90,934	4,659

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	48,852	13,655	25,586	88,093	29%
25	74,947	22,733	39,865	137,545	45%
50	92,894	35,958	55,315	184,167	61%
100	119,995	49,122	71,858	240,975	79%
150	138,389	57,626	82,446	278,461	92%
200	148,366	64,023	90,843	303,232	100%

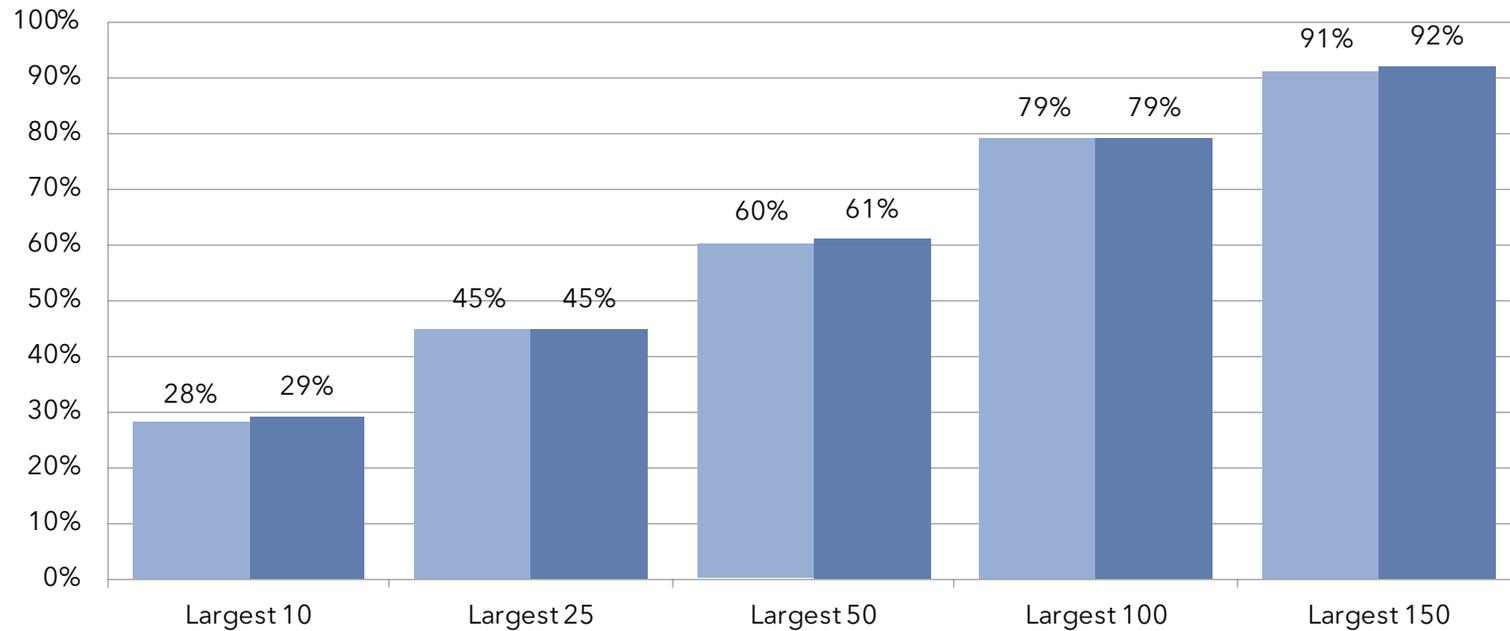
Analysis of Unit Mix for Each Year's Respective LZ 150 & LZ 200 Listing*									
					Largest	2019 Total Units	2018 Total Units	Change in total units	Percent change in total units
2015 LZ 150*									
2014 avg units/system	773.4	311.4	451.7	1,531.6					
Percent of total	50.4%	19.5%	30.0%	100%	10	88,093	85,809	2,284	2.6%
2016 LZ 150*					25	137,545	134,648	2,897	2.1%
2015 avg units/system	827.1	342.9	547.4	1,717.4	50	184,167	180,566	3,601	2.0%
Percent of total	48.2%	20.0%	31.9%	100%	100	240,975	236,461	4,485	1.9%
2017 LZ 150*					150	278,461	273,476	4,666	1.7%
2016 avg units/system	846.0	352.4	569.2	1,767.6	200	303,232	298,034	4,659	1.5%
Percent of total	47.9%	19.9%	32.2%	100%					
2018 LZ 200**									
2017 avg units/system	714.8	298.7	464.8	1,478.3					
Percent of total	48.4%	20.2%	31.4%	100%					
2019 LZ 200**									
2018 avg units/system	734.8	311.8	462.8	1509.4					
Percent of total	48.4%	20.2%	31.4%	100%					
2020 LZ 200**									
2019 avg units/system	741.8	320.1	454.2	1516.2					
Percent of total	48.9%	21.1%	30.0%	100%					

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

**Note change from 150 to 200 in the 2018 publication

Organizational Characteristics: Locations

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

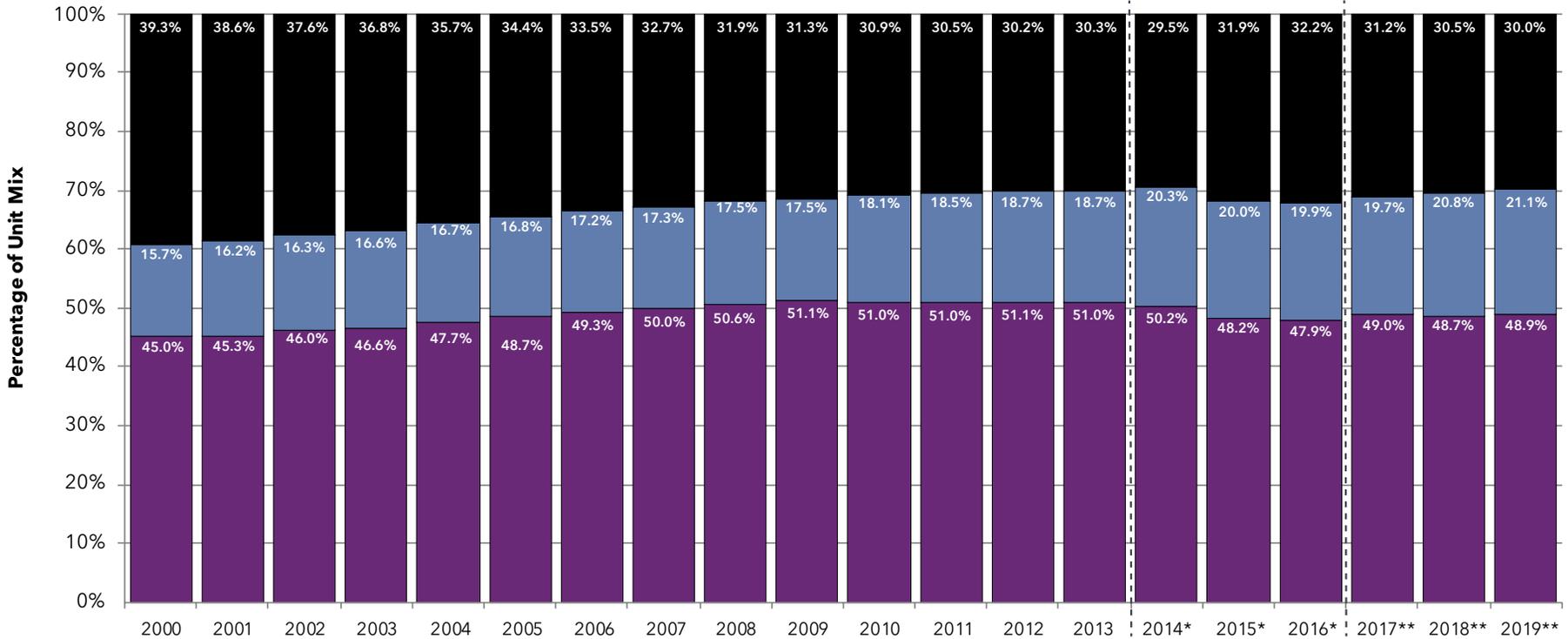


KEY:



Organizational Characteristics: Locations

Total Mix by Year, by Percent, 2000 Through 2019 for 2020 LZ 200



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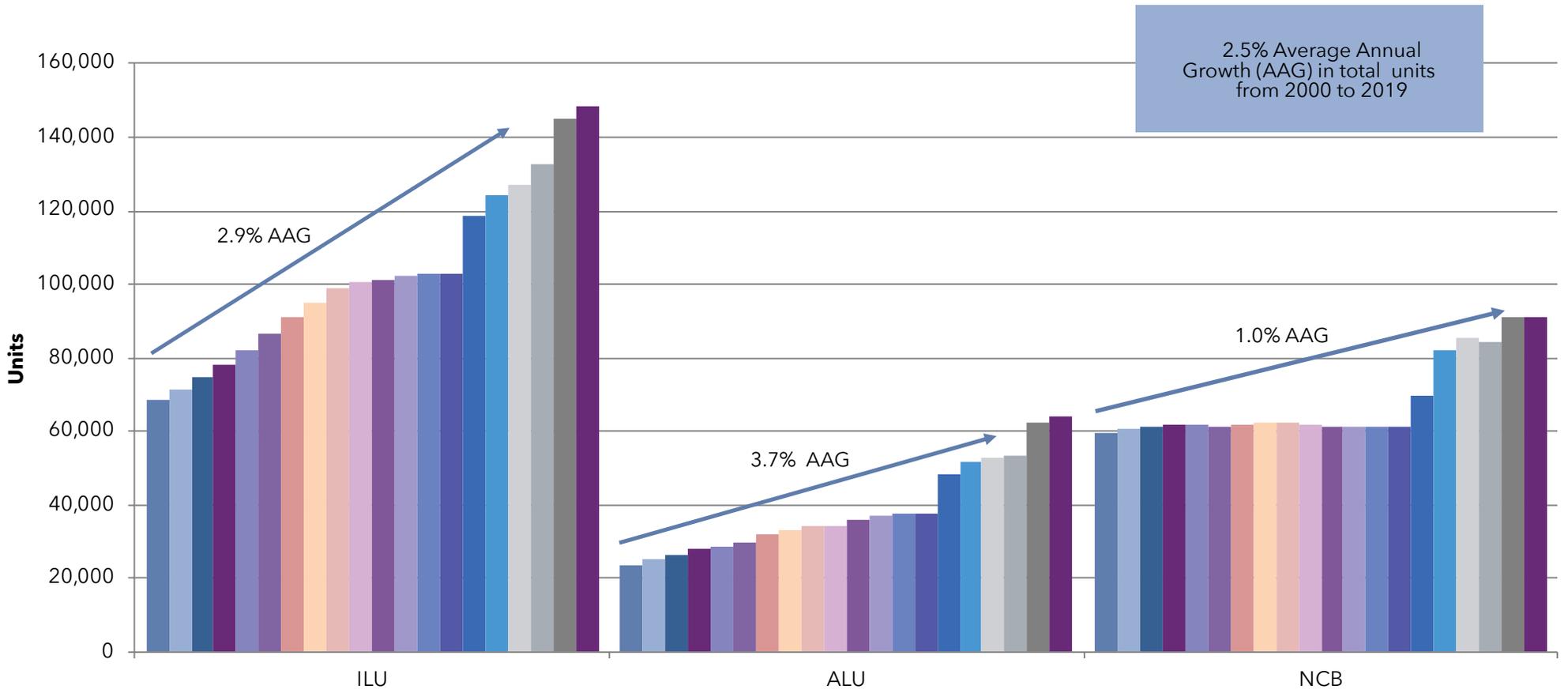
■ ILU ■ ALU ■ NCB

*Reflects change from 100 to 150 with the 2014 publication

**Reflects change from 150 to 200 with the 2018 publication

Organizational Characteristics: Locations

Unit Type Comparison, 2000 Through 2019 for 2020 LZ 200



KEY:

- 2000
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012
- 2013
- 2014*
- 2015*
- 2016*
- 2017**
- 2018**
- 2019**

*Reflects change from 100 to 150 with the 2014 publication
 **Reflects change from 150 to 200 with the 2018 publication

Organizational Characteristics: Communities Rank Detailed by Communities (2019 vs 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2018 to 2019
				2019 Communities					2018 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
1	1	National Senior Campuses	MA	16	16	0	0	0	16	16	0	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	142	53	8	9	72	153	59	8	9	77	-11
3	3	ACTS Retirement Services, Inc.	PA	26	26	0	0	0	23	23	0	0	0	3
4	5	Ascension Living	MO	48	2	5	3	38	48	2	5	3	38	0
5	4	Presbyterian Homes and Services	MN	46	15	28	0	3	45	15	27	0	3	1
6	6	Trinity Health Senior Communities	MI	54	6	13	14	21	55	6	13	15	21	-1
7	8	HumanGood	CA	21	20	1	0	0	18	17	1	0	0	3
8	7	Covenant Living Communities & Services	IL	18	13	2	2	1	17	12	2	2	1	1
9	11	Lifespace Communities Inc.	IA	15	15	0	0	0	12	12	0	0	0	3
10	9	Benedictine fka Benedictine Health System	MN	33	25	1	4	3	34	24	1	4	5	-1
11	12	Westminster Communities of Florida	FL	13	10	3	0	0	12	10	2	0	0	1
12	10	Retirement Housing Foundation	CA	18	9	8	1	0	18	9	8	1	0	0
13	13	Cassia	MN	51	0	5	28	18	51	0	5	28	18	0
14	14	The Kendal Corporation	PA	15	13	2	0	0	15	13	2	0	0	0
15	15	Presbyterian Senior Living	PA	20	12	6	2	0	20	12	6	2	0	0
16	17	Asbury Communities, Inc.	MD	8	8	0	0	0	7	7	0	0	0	1
17	16	Lutheran Senior Services	MO	11	8	0	1	2	11	8	0	1	2	0
18	18	Ohio Living	OH	13	13	0	0	0	13	13	0	0	0	0
19	19	The Carmelite System, Inc.	NY	16	1	1	2	12	17	0	1	2	14	-1
20	20	Pacific Retirement Services, Inc.	OR	9	9	0	0	0	9	9	0	0	0	0
21	21	Front Porch Communities and Services	CA	10	5	5	0	0	10	5	5	0	0	0
22	22	Concordia Lutheran Ministries	PA	14	6	0	6	2	14	6	0	6	2	0
23	23	Otterbein SeniorLife	OH	15	6	0	0	9	15	6	0	0	9	0
24	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	5	3	1	0	1	5	3	1	0	1	0
25	24	Springpoint Senior Living Inc.	NJ	9	8	0	0	1	9	8	0	0	1	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2019 vs 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2018 to 2019
				2019 Communities					2018 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
26	26	Volunteers of America	VA	23	4	2	9	8	23	4	2	9	8	0
27	27	Diakon Lutheran Social Ministries	PA	9	9	0	0	0	9	9	0	0	0	0
28	28	Christian Care Companies	AZ	7	0	6	0	1	7	0	6	0	1	0
29	29	Presbyterian Manors of Mid-America, Inc.	KS	16	15	0	1	0	17	16	0	1	0	-1
30	30	Shell Point Retirement Community	FL	2	2	0	0	0	2	2	0	0	0	0
31	31	Christian Horizons	MO	13	11	0	1	1	13	11	0	1	1	0
32	33	Ecumen	MN	30	0	5	20	5	30	0	5	20	5	0
33	34	Willow Valley Communities	PA	3	3	0	0	0	3	3	0	0	0	0
34	36	Homewood Retirement Centers Inc.	MD	5	5	0	0	0	5	5	0	0	0	0
35	38	Transforming Age	WA	14	3	7	4	0	14	2	8	4	0	0
36	44	WesleyLife	IA	10	10	0	0	0	8	8	0	0	0	2
37	37	Greencroft Communities	IN	9	7	0	2	0	9	7	0	2	0	0
38	39	ArchCare	NY	6	0	0	1	5	6	0	0	1	5	0
39	43	Bethesda Senior Living Communities	CO	18	0	2	16	0	18	0	1	17	0	0
40	35	Franciscan Communities, Inc.	IL	7	4	1	2	0	8	4	1	3	0	-1
41	55	Buckner Retirement Services, Inc.	TX	6	6	0	0	0	5	5	0	0	0	1
42	40	Loretto	NY	9	1	2	4	2	9	1	2	4	2	0
43	42	Covenant Health	MA	12	0	0	3	9	12	0	0	3	9	0
44	41	National Church Residences	OH	9	3	3	3	0	9	3	3	3	0	0
45	45	Hebrew SeniorLife	MA	4	2	1	0	1	4	2	1	0	1	0
46	46	Presbyterian SeniorCare Network	PA	7	7	0	0	0	7	7	0	0	0	0
47	48	Lutheran Life Communities	IL	6	4	0	0	2	6	4	0	0	2	0
48	50	Baptist Village Communities	OK	12	3	8	1	0	12	3	8	1	0	0
49	64	BHI Senior Living, Inc.	IN	5	5	0	0	0	4	4	0	0	0	1
50	51	Eskaton	CA	12	1	1	7	3	12	1	1	7	3	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2019 vs 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2018 to 2019
				2019 Communities					2018 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
51	57	United Church Homes, Inc.	OH	11	5	2	0	4	10	5	1	0	4	1
52	52	Magnolia Manor, Inc.	GA	8	2	4	1	1	8	2	4	1	1	0
53	56	Bethesda Health Group, Inc	MO	12	0	6	2	4	12	0	6	2	4	0
54	53	Mississippi Methodist Senior Services, Inc.	MS	12	2	8	0	2	12	2	8	0	2	0
55	49	Providence Life Services	IL	7	1	4	1	1	8	1	4	1	2	-1
56	54	Presbyterian Homes	IL	4	3	1	0	0	4	3	1	0	0	0
57	47	Covia Communities	CA	5	5	0	0	0	6	6	0	0	0	-1
58	58	Masonicare	CT	6	2	2	1	1	6	2	2	1	1	0
59	76	Methodist Retirement Communities	TX	7	5	1	1	0	6	4	1	1	0	1
60	59	SantaFe Senior Living, Inc.	FL	3	2	1	0	0	3	2	1	0	0	0
61	60	Lutheran Services Carolinas	NC	9	1	1	1	6	9	1	1	1	6	0
62	61	Presbyterian Village of Michigan	MI	10	1	7	2	0	10	1	7	2	0	0
63	71	LifeSpire of Virginia	VA	4	4	0	0	0	4	4	0	0	0	0
64	68	Heritage Ministries	NY	8	4	2	1	1	9	4	2	1	2	-1
65	67	American Baptist Homes of the Midwest	MN	7	5	0	0	2	7	5	0	0	2	0
66	62	Immanuel	NY	17	7	1	7	2	17	7	1	7	2	0
67	63	Wesley Enhanced Living	PA	6	5	0	1	0	6	5	0	1	0	0
68	151	UMRC and Porter Hills	MI	6	3	2	1	0	3	2	1	0	0	3
69	69	Holland Home	MI	6	2	0	2	2	6	2	0	2	2	0
70	65	SpiriTrust Lutheran	PA	6	6	0	0	0	6	6	0	0	0	0
71	92	Western Home Services	IA	5	2	2	0	1	4	1	2	0	1	1
72	72	Phoebe Ministries	PA	4	4	0	0	0	4	4	0	0	0	0
73	78	Eventide	MN	6	5	0	1	0	6	5	0	1	0	0
74	111	Ingleside	MD	3	3	0	0	0	3	3	0	0	0	0
75	66	Friendship Senior Options	IL	2	2	0	0	0	2	2	0	0	0	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2019 vs 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2018 to 2019
				2019 Communities					2018 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
76	75	Lutheran SeniorLife	PA	5	2	3	0	0	5	2	3	0	0	0
77	70	Pinnacle Living	VA	5	5	0	0	0	6	5	0	0	1	-1
78	79	United Methodist Homes	NY	4	3	1	0	0	4	3	1	0	0	0
79	73	Walker Methodist	MN	9	0	0	8	1	9	0	0	8	1	0
80	77	Lutheran Homes of SC	SC	5	5	0	0	0	5	5	0	0	0	0
81	87	The Presbyterian Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
82	81	Saint Therese	MN	5	3	1	0	1	5	3	0	1	1	0
83	85	Blue Skies of Texas	TX	2	2	0	0	0	2	2	0	0	0	0
84	80	Presbyterian Communities of South Carolina	SC	6	6	0	0	0	6	6	0	0	0	0
85	83	Felician Services, Inc.	IL	8	2	2	1	3	8	2	2	1	3	0
86	84	Friendship Villages of St. Louis	MO	2	2	0	0	0	2	2	0	0	0	0
87	94	The United Methodist Retirement Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
88	86	Liberty Lutheran Services	PA	5	4	0	1	0	5	4	0	1	0	0
89	88	Baruch fka Baruch Senior Ministries	MI	24	0	0	24	0	24	0	0	24	0	0
90	89	Haverland Carter Lifestyle Group	NM	4	2	0	2	0	4	2	0	2	0	0
91	90	Oakwood Lutheran Senior Ministries, Inc.	WI	2	2	0	0	0	2	2	0	0	0	0
92	91	United Church Homes and Services	NC	3	3	0	0	0	3	3	0	0	0	0
93	93	Sequoia Living, Inc	CA	3	3	0	0	0	3	3	0	0	0	0
94	95	Wesley	WA	3	2	1	0	0	3	2	1	0	0	0
95	96	Christian Care Communities	KY	7	5	1	1	0	7	5	1	1	0	0
96	105	Christian Living Communities	CO	5	3	0	2	0	4	3	0	1	0	1
97	99	St. John's	NY	4	0	1	1	2	4	0	1	1	2	0
98	104	St. Ann's of Greater Rochester, Inc.	NY	3	2	1	0	0	2	2	0	0	0	1
99	102	Givens Communities	NC	2	2	0	0	0	2	2	0	0	0	0
100	101	Masonic Homes of Kentucky	KY	3	1	1	0	1	3	1	1	0	1	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2019 vs 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2018 to 2019
				2019 Communities					2018 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
101	103	United Methodist Communities	NJ	4	1	0	3	0	4	1	0	3	0	0
102	108	St. Andrew's Resources for Seniors System	MO	6	1	2	1	2	6	1	2	1	2	0
103	112	Sun Health Services fka Sun Health Senior Living LLC	AZ	3	3	0	0	0	3	3	0	0	0	0
104	97	Menno Haven, Inc.	PA	2	2	0	0	0	2	2	0	0	0	0
105	106	Goodwin House Incorporated	VA	2	2	0	0	0	2	2	0	0	0	0
106	107	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
107	109	The New Jewish Home	NY	3	0	1	0	2	3	0	1	0	2	0
108	131	The RiverWoods Group	NH	3	3	0	0	0	2	2	0	0	0	1
109	110	Lutheran Social Ministries of Maryland	MD	2	2	0	0	0	2	2	0	0	0	0
110	129	Landis Communities	PA	3	1	1	1	0	3	1	1	1	0	0
111	116	Life Enriching Communities	OH	2	2	0	0	0	2	2	0	0	0	0
112	113	LutherCare	PA	3	2	0	0	1	3	2	0	0	1	0
113	114	Messiah Lifeways	PA	2	1	1	0	0	2	1	1	0	0	0
114	115	Simpson Senior Servies	PA	3	3	0	0	0	3	3	0	0	0	0
115	117	Mather fka Mather LifeWays	IL	3	2	1	0	0	3	2	1	0	0	0
116	118	Wesley Willows	IL	2	1	1	0	0	2	1	1	0	0	0
117	119	National Lutheran Communities & Services	MD	3	0	2	1	0	3	0	2	1	0	0
118	120	The Ohio Masonic Home	OH	3	2	0	1	0	3	2	0	1	0	0
119	122	Sunnyside Presbyterian Home	VA	3	3	0	0	0	3	3	0	0	0	0
120	121	Garden Spot Communities	PA	2	1	0	0	1	2	1	0	0	1	0
121	123	Amsterdam Continuing Care Health System, Inc.	NY	2	1	0	0	1	2	1	0	0	1	0
122	124	Lutheran Social Ministries of New Jersey, Inc.	NJ	3	1	0	0	2	3	1	0	0	2	0
123	127	Grace Inspired Ministries	PA	2	2	0	0	0	2	2	0	0	0	0
124	128	United Church of Christ Homes	PA	6	0	2	0	4	6	0	2	0	4	0
125	126	Samaritas	MI	5	1	2	0	2	5	1	2	0	2	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2019 vs 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2018 to 2019
				2019 Communities					2018 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
126	125	Christian Care Centers	TX	3	3	0	0	0	3	3	0	0	0	0
127	130	Brazos Presbyterian Homes Inc.	TX	3	3	0	0	0	3	3	0	0	0	0
128	132	Benevolent Corporation Cedar Community	WI	8	0	3	4	1	8	0	3	4	1	0
129	133	Vista Prairie Communities	MN	8	0	0	8	0	8	0	0	8	0	0
130	134	Moorings Park	FL	2	2	0	0	0	2	2	0	0	0	0
131	136	Emerald Communities	WA	2	2	0	0	0	2	2	0	0	0	0
132	137	Morningside Ministries	TX	2	2	0	0	0	2	2	0	0	0	0
133	138	Christian Health Care Center	NJ	5	0	3	1	1	5	0	3	1	1	0
134	139	United Methodist Memorial Home	IN	3	3	0	0	0	3	3	0	0	0	0
135	141	Maple Knoll Communities, Inc.	OH	2	2	0	0	0	2	2	0	0	0	0
136	135	The Wesley Communities fka Methodist ElderCare Services	OH	3	1	2	0	0	3	1	2	0	0	0
137	142	Sunset Senior Communities fka Sunset Retirement Communities	MI	4	2	0	1	1	4	2	0	1	1	0
138	144	Vincentian Collaborative Services	PA	4	2	0	0	2	4	2	0	0	2	0
139	145	LifeStream Complete Senior Living, Inc.	AZ	4	1	2	0	1	4	1	2	0	1	0
140	154	Smith Senior Living	IL	2	2	0	0	0	2	2	0	0	0	0
141	146	Elder Care Alliance	CA	5	1	1	3	0	5	1	1	3	0	0
142	159	Baptist Homes Society	PA	2	1	0	0	1	2	1	0	0	1	0
143	148	Episcopal SeniorLife Communities	NY	9	0	5	3	1	9	0	5	3	1	0
144	149	Community Wellness Partners, Inc.	NY	4	0	1	1	2	4	0	1	1	2	0
145	150	Wellspring Lutheran Services	MI	9	1	2	2	4	9	1	2	2	4	0
146	NR	Luther Manor	WI	2	1	0	1	0	0	0	0	0	0	0
147	143	CRISTA Senior Living	WA	2	2	0	0	0	2	2	0	0	0	0
148	152	Chelsea Jewish Lifecare, Inc.	MA	6	0	1	2	3	6	0	1	2	3	0
149	153	Baptist Retirement Homes of North Carolina Incorporated	NC	4	2	0	1	1	4	2	0	2	0	0
150	155	Deaconess Abundant Life Communities	MA	5	3	1	1	0	5	3	1	1	0	0

NR: Not Ranked in that year

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2019 vs 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2018 to 2019
				2019 Communities					2018 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
151	156	Genacross Lutheran Services	OH	4	2	1	0	1	4	2	1	0	1	0
152	157	St. John's Lutheran Ministries, Inc.	MT	5	4	0	1	0	5	4	0	1	0	0
153	158	Shepherd of the Valley Lutheran Retirement Services	OH	4	2	1	0	1	4	2	1	0	1	0
154	160	Episcopal Retirement Services	OH	3	3	0	0	0	3	3	0	0	0	0
155	162	Friends Homes, Inc.	NC	2	2	0	0	0	2	2	0	0	0	0
156	164	Sholom	MN	5	0	1	2	2	5	0	1	2	2	0
157	165	Havenwood Heritage Heights	NH	2	2	0	0	0	2	2	0	0	0	0
158	161	Ebenezer Society	MN	8	0	0	5	3	8	0	0	5	3	0
159	166	Episcopal Communities & Services	CA	3	3	0	0	0	3	3	0	0	0	0
160	167	Bethel	NY	5	1	1	1	2	5	1	1	1	2	0
161	168	Christian Village Communities	OH	2	2	0	0	0	2	2	0	0	0	0
162	169	Friendly Senior Living	NY	4	0	2	1	1	4	0	2	1	1	0
163	170	Bethany Lutheran Homes, Inc.	WI	10	2	1	6	1	10	2	1	6	1	0
164	171	Church Homes, Inc.	CT	2	2	0	0	0	2	2	0	0	0	0
165	172	Cardinal Ritter Senior Services	MO	4	1	1	1	1	4	1	1	1	1	0
166	173	Medford Leas	NJ	2	1	1	0	0	2	1	1	0	0	0
167	175	EHM Senior Solutions	MI	8	1	3	2	2	8	1	3	2	2	0
168	174	Rockwood Retirement Communities	WA	2	2	0	0	0	2	2	0	0	0	0
169	176	The Lutheran Home Association	WI	6	2	1	2	1	6	2	1	2	1	0
170	140	Lutheran Life Villages	IN	3	1	0	0	2	3	1	0	0	2	0
171	177	Redstone Presbyterian SeniorCare	PA	7	0	3	3	1	7	0	3	3	1	0
172	178	United Methodist Homes	CT	3	1	0	2	0	3	1	0	2	0	0
173	180	Presbyterian Homes of Georgia	GA	5	2	3	0	0	5	2	3	0	0	0
174	181	Judson Services, Inc.	OH	2	1	1	0	0	2	1	1	0	0	0
175	182	Bethany St. Joseph Corporation	WI	12	0	5	5	2	12	0	5	5	2	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2019 vs 2018)

2020 Rank	2019 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2018 to 2019
				2019 Communities					2018 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
176	183	The Eliza Jennings Senior Care Network	OH	3	1	0	1	1	3	1	0	1	1	0
177	184	Knute Nelson	MN	6	0	2	3	1	6	0	2	3	1	0
178	NR	St. Paul's Episcopal Home, Inc.	CA	4	0	1	2	1	0	0	0	0	0	4
179	185	United Methodist Services for the Aging	PA	2	1	1	0	0	2	1	1	0	0	0
180	179	Avinity fka Avinity Senior Living	MN	6	0	3	3	0	6	0	3	3	0	0
181	186	Wesley Woods Senior Living	GA	10	2	8	0	0	10	2	8	0	0	0
182	187	Presbyterian Homes and Services of Kentucky	KY	4	0	0	2	2	4	0	0	2	2	0
183	188	The Loomis Communities	MA	3	3	0	0	0	3	3	0	0	0	0
184	189	Allegheny Lutheran Social Ministries	PA	3	3	0	0	0	3	3	0	0	0	0
185	190	Beechwood Health Care Center, Inc.	NY	3	0	1	1	1	3	0	1	1	1	0
186	191	Michigan Masonic Homes	MI	2	1	0	0	1	2	1	0	0	1	0
187	192	Council for Jewish Elderly	IL	3	0	1	1	1	3	0	1	1	1	0
188	193	Willow Brook Christian Communities	OH	3	2	0	1	0	3	2	0	1	0	0
189	194	Baptist Life Communities	KY	6	1	2	1	2	6	1	2	1	2	0
190	197	Parker Health Group, Inc.	NJ	5	0	0	1	4	5	0	0	1	4	0
191	195	Skaalen Retirement Services	WI	8	0	4	3	1	8	0	4	3	1	0
192	NR	Jewish Senior Life of Metropolitan Detroit	MI	4	0	2	2	0	4	0	2	2	0	0
193	196	A.G. Rhodes Health & Rehab	GA	3	0	0	0	3	3	0	0	0	3	0
194	198	Colonial Senior Services, Inc	OH	3	3	0	0	0	3	3	0	0	0	0
195	200	SCBMA	SC	2	2	0	0	0	2	2	0	0	0	0
196	199	Clark Retirement Community, Inc.	MI	2	2	0	0	0	2	2	0	0	0	0
197	NR	Saint Mary's Home of Erie	PA	6	1	1	2	2	6	1	1	2	2	0
198	NR	Valley View Retirement Community	PA	2	2	0	0	0	2	2	0	0	0	0
199	NR	Good Shepherd Communities	NY	2	2	0	0	0	2	2	0	0	0	0
200	NR	Cornerstone Village	TN	2	1	0	1	0	2	1	0	1	0	0
		TOTAL UNITS		1,587	692	268	299	328	1,575	677	261	299	338	12

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	191	58	32	138	419	26%
25	302	89	72	183	646	41%
50	407	127	146	220	900	57%
100	554	182	208	254	1,198	75%
150	627	216	243	288	1,374	87%
200	693	268	298	328	1,587	100%

Analysis of Community Mix for Each Year's Respective LZ 200 Listing*					
	LPC	IL	AL	NH	ALL
2015 LZ 150*					
2014 avg communities/system	3.8	1.1	1.1	1.3	7.3
Percent of total	53.1%	14.0%	14.8%	18.1%	100.0%
2016 LZ 150*					
2015 avg communities/system	4.2	1.2	1.2	1.7	8.4
Percent of total	50.0%	14.4%	14.9%	20.7%	100.0%
2017 LZ 150*					
2016 avg communities/system	4.2	1.2	1.2	1.7	8.4
Percent of total	50.0%	14.4%	14.9%	20.7%	100.0%
2018 LZ 200**					
2017 avg communities/system	3.4	1.3	1.2	1.5	7.4
Percent of total	45.9%	17.3%	15.9%	20.9%	100.0%
2019 LZ 200**					
2018 avg communities/system	3.5	1.3	1.4	1.6	7.8
Percent of total	44.5%	17.3%	17.8%	20.4%	100.0%
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%

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

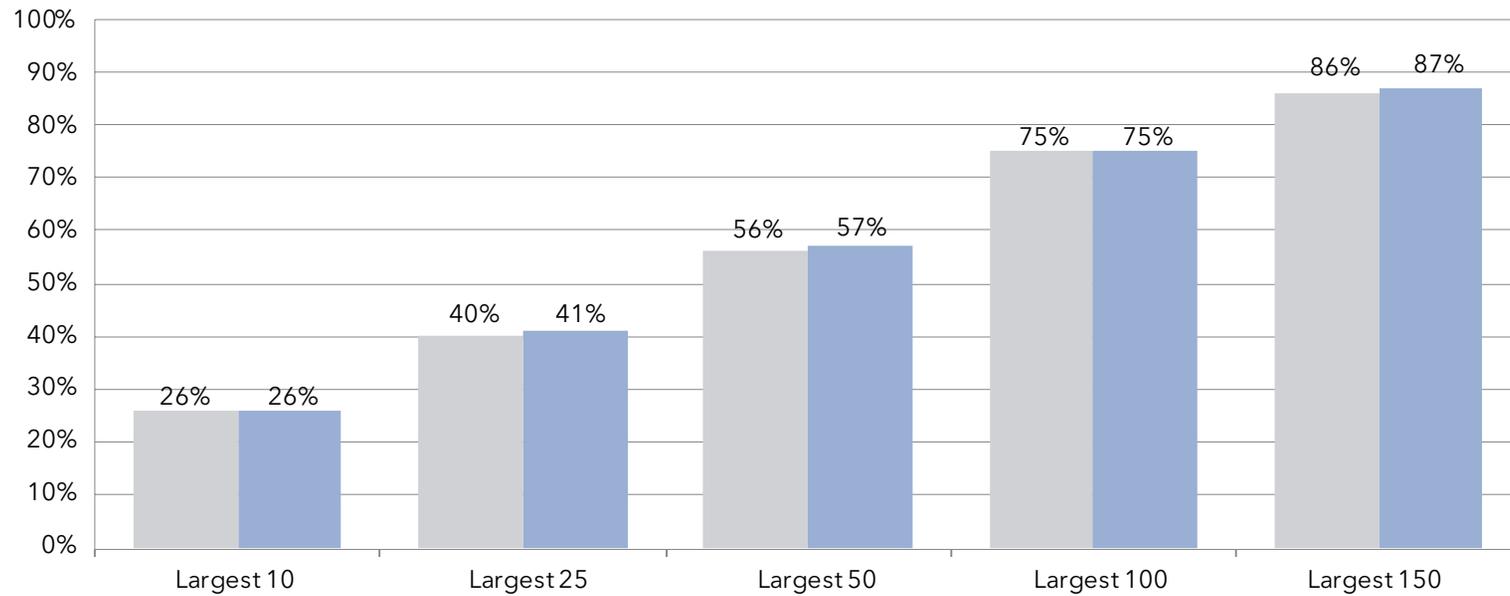
**Note change from 150 to 200 in the 2018 publication

Largest	2019 Total Communities	2018 Total Communities	Change in total communities	Percent change in total communities
10	419	421	-2	-0.5%
25	646	647	-1	-0.2%
50	900	899	1	0.1%
100	1,198	1,193	5	0.4%
150	1,374	1,366	8	0.6%
200	1,587	1,575	12	0.8%

*Largest 10 community reduction primarily attributed to ELGSS dispositions/closures

Organizational Characteristics: Communities

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

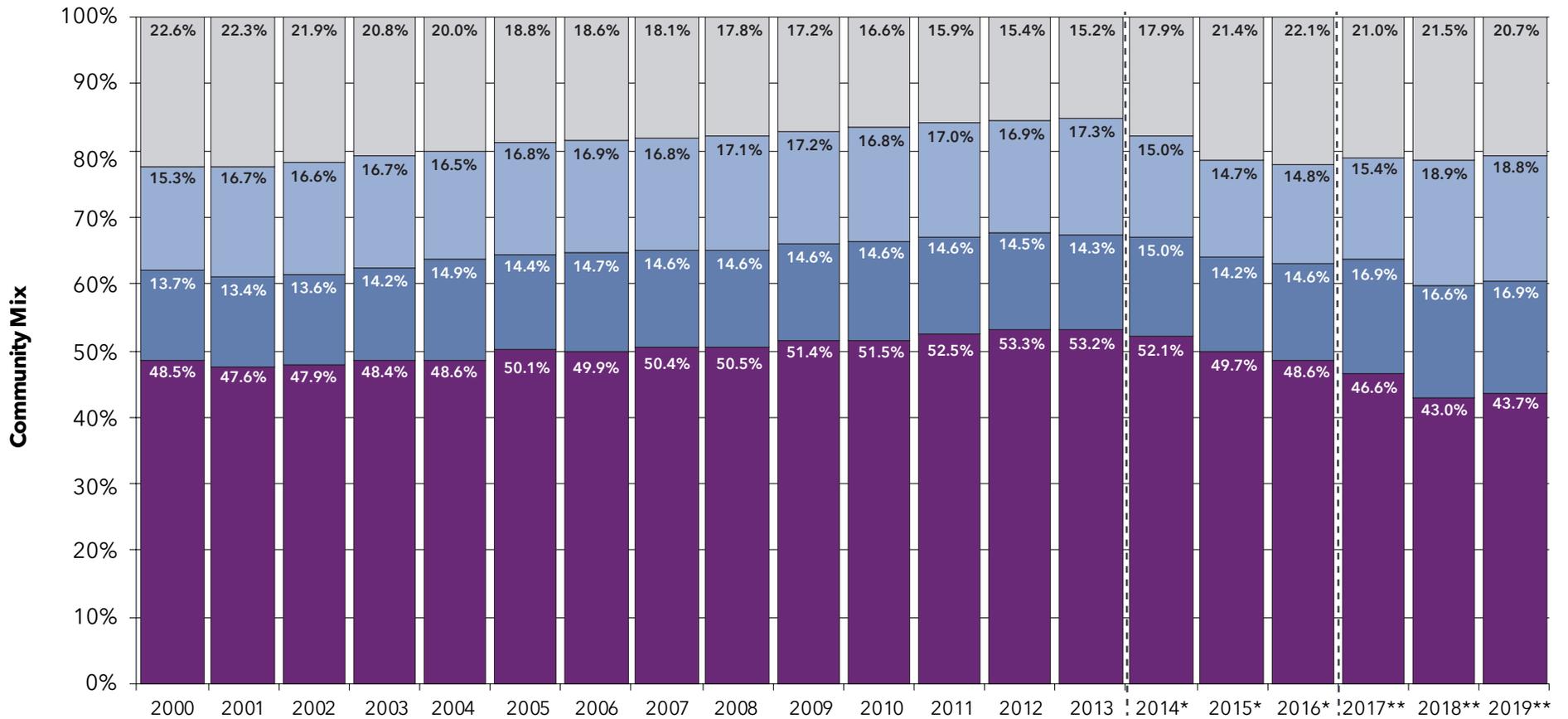


KEY:



Organizational Characteristics: Communities

Total Mix by Year, by Percent, 2000 Through 2019 for 2020 LZ 200



KEY: ■ LPC ■ IL ■ AL ■ NH

*Note change from 100 to 150 with the 2014 publication

**Note change from 150 to 200 with the 2018 publication

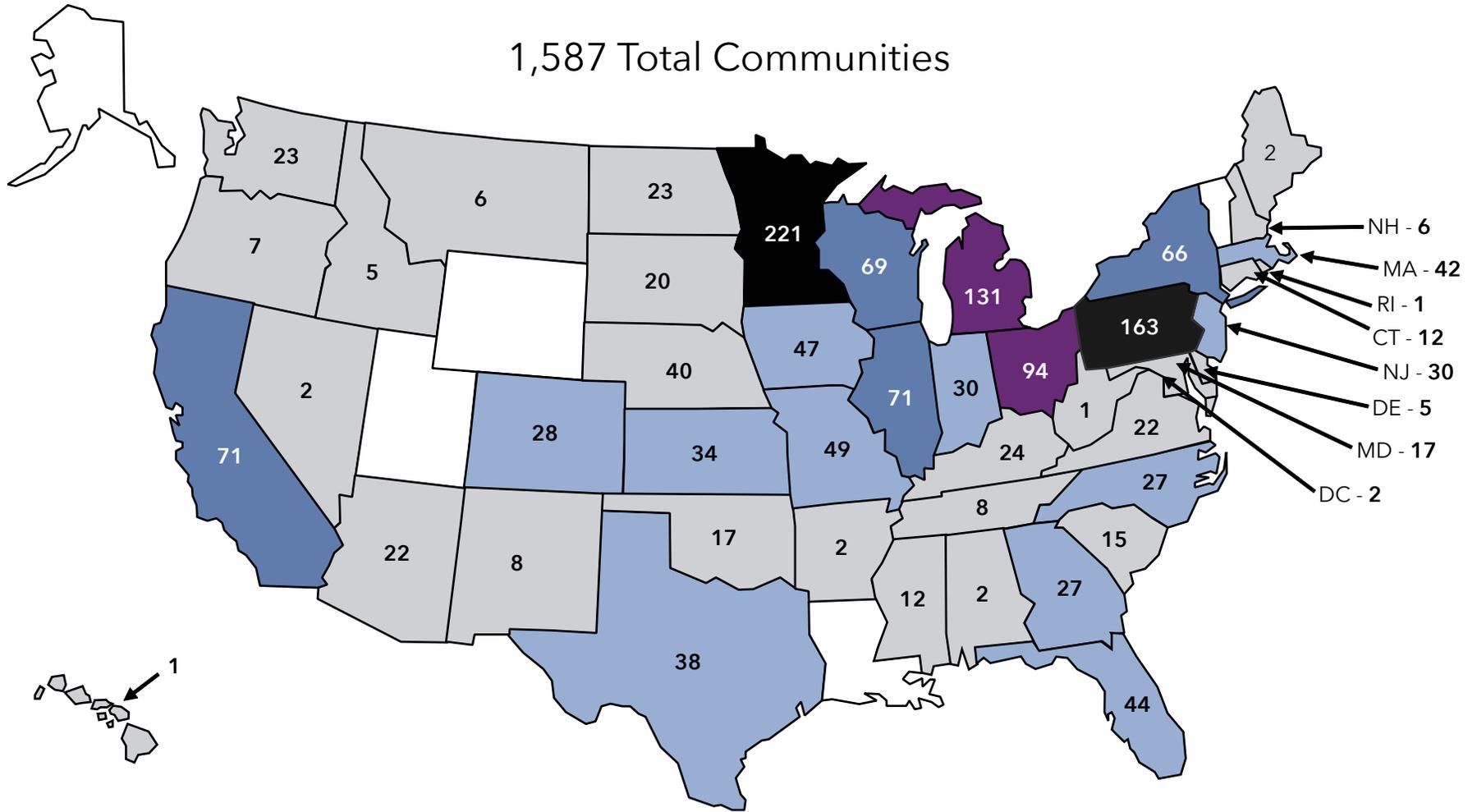
Organizational Characteristics: Locations

Top Five States by Community Type

LPC			ILF			ALF			NH		
1	PA	107	1	MN	45	1	MN	80	1	MN	50
2	OH	53	2	MI	30	2	MI	51	2	MI	30
3	MN	46	3	PA	21	3	WI	21	3	IL	23
4	CA	42	4	WI	20	4	PA	17	4	NY	22
5	FL	35	5	NY	18	5	NY	14	5	OH	22

Organizational Characteristics: Locations

Community Locations

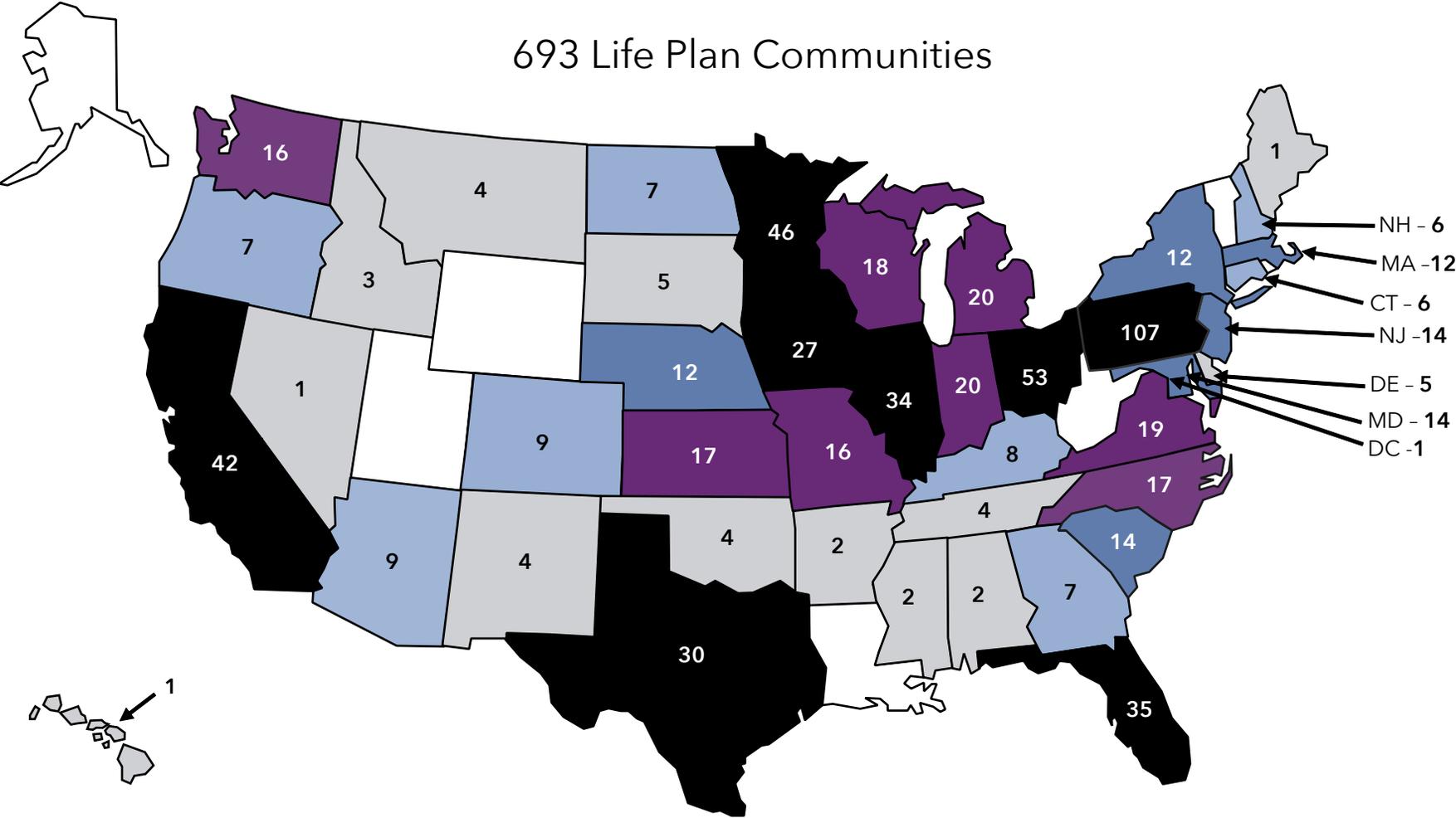


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Organizational Characteristics: Locations

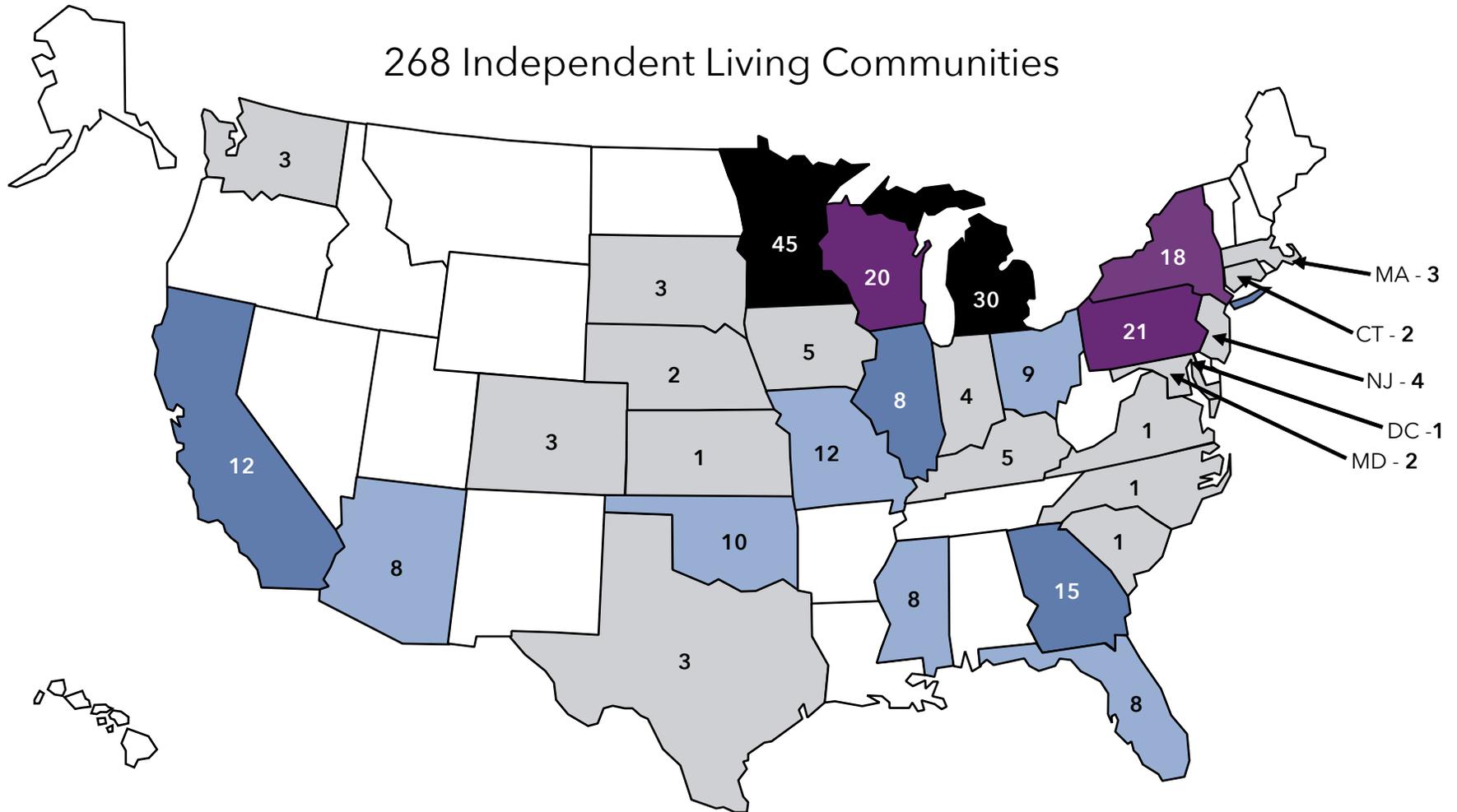
Life Plan Community (LPC) Locations



KEY:

- 1 to 5 LZ 200 LPCs
- 16 to 25 LZ 200 LPCs
- 6 to 10 LZ 200 LPCs
- Over 25 LZ 200 LPCs
- None
- 11 to 15 LZ 200 LPCs

Organizational Characteristics: Locations Independent Living (IL) Community Locations

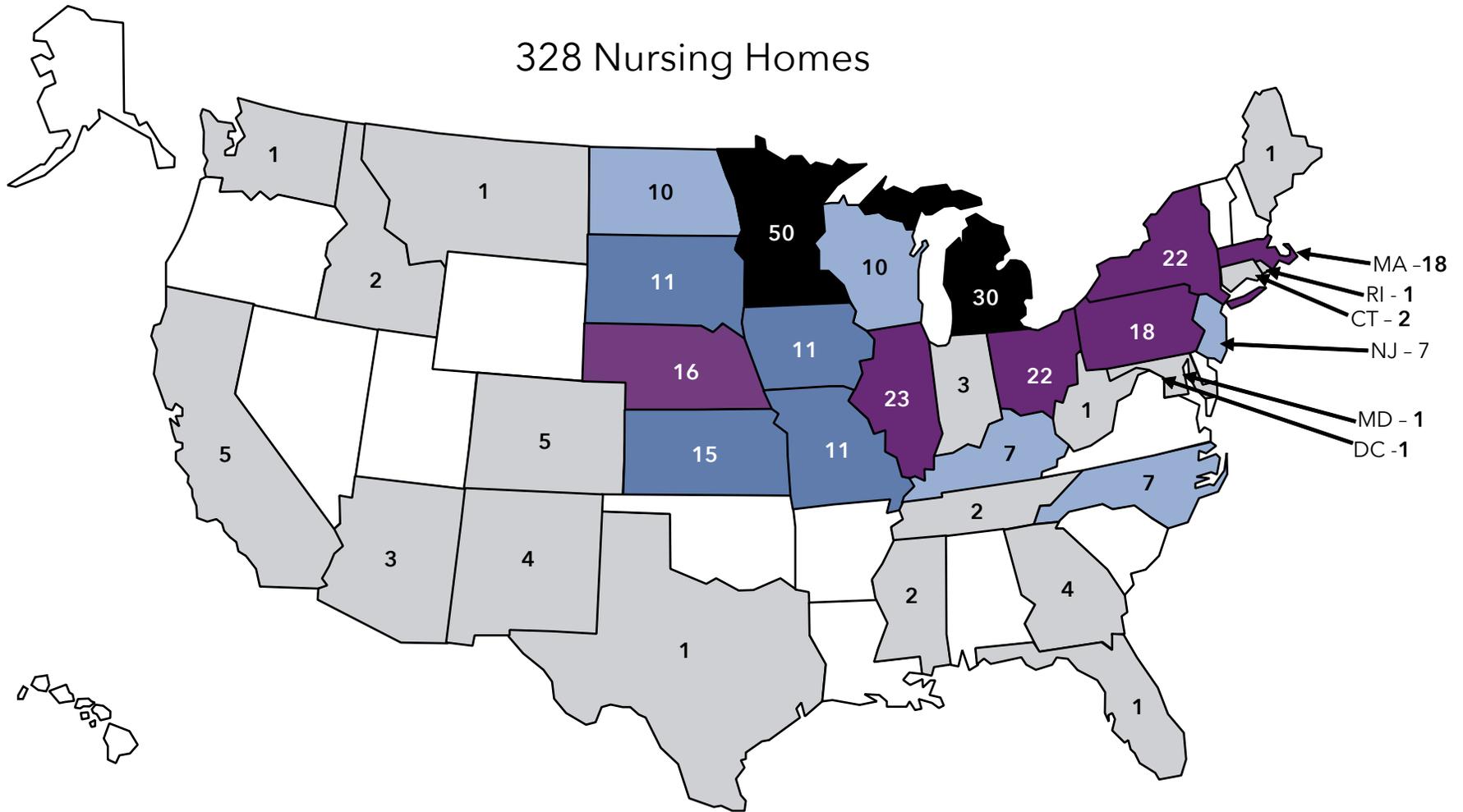


KEY:



Organizational Characteristics: Locations

Nursing Home (NH) Locations



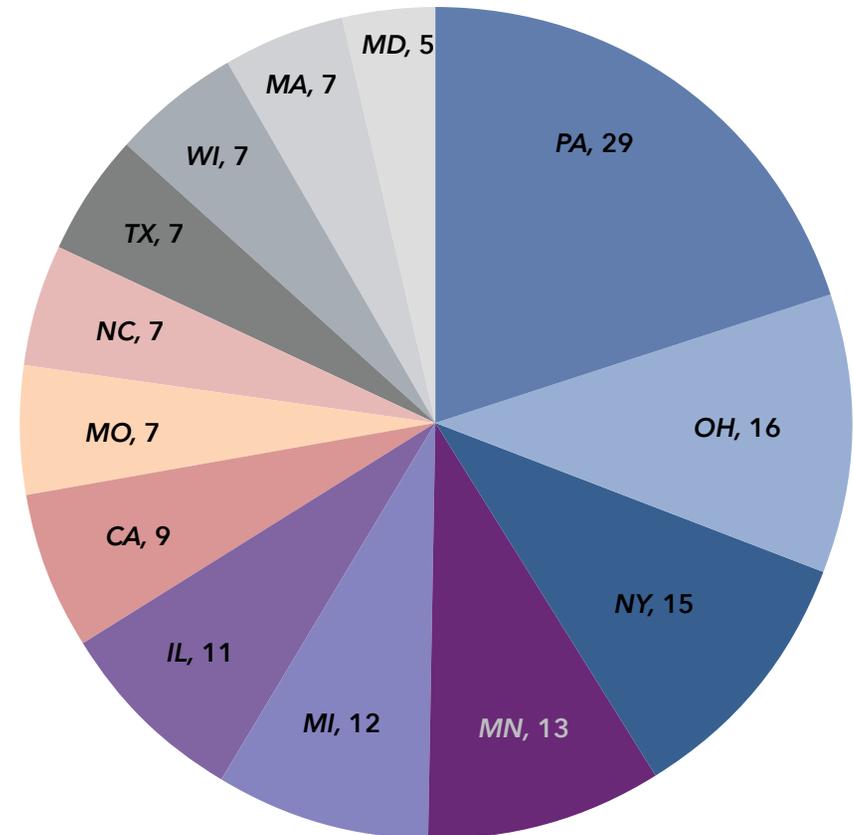
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Organizational Characteristics: System Headquarters *States with Largest Number of Headquarters' Locations*

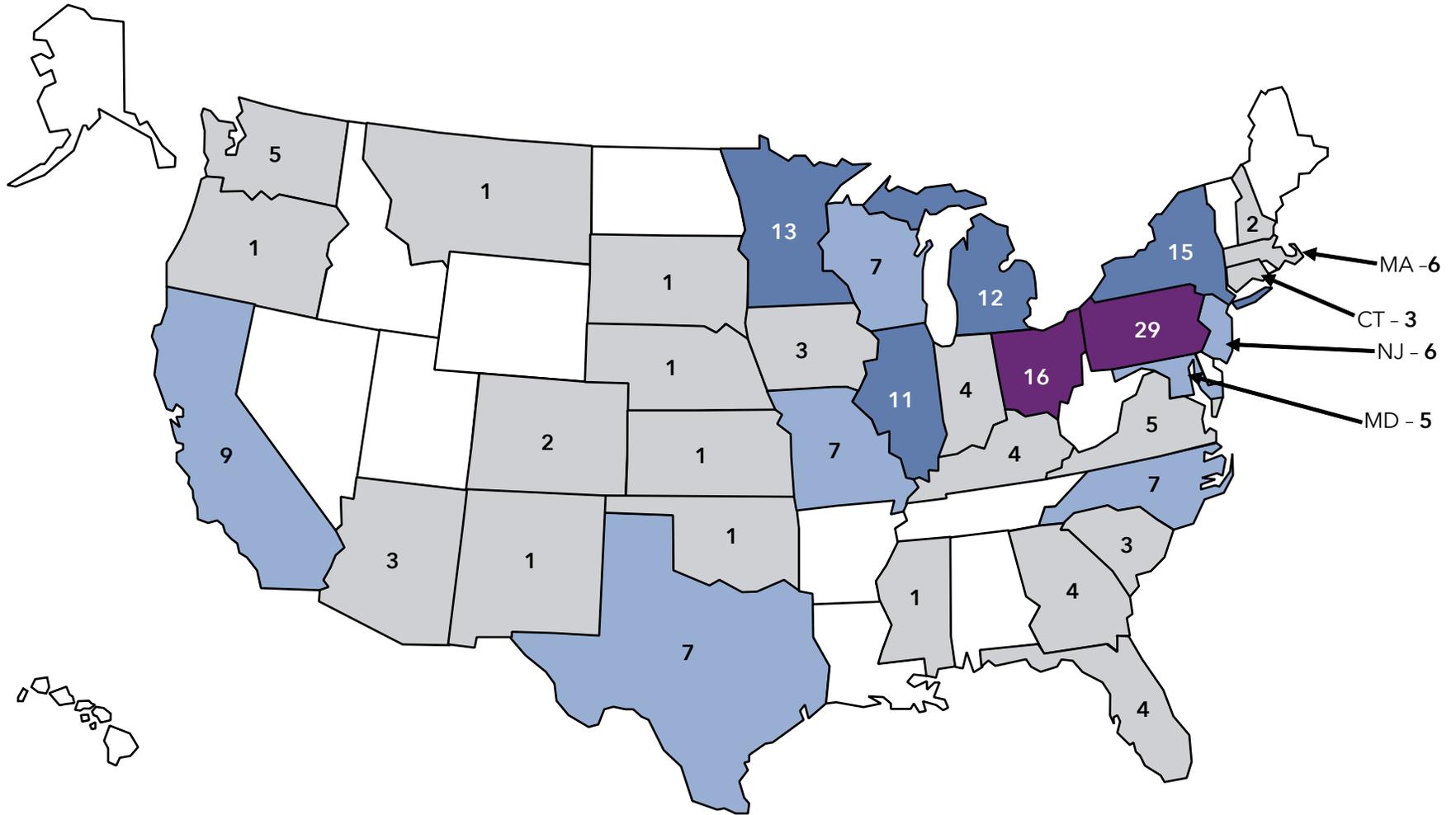
System Headquarters

The state shown for each of the LZ 200 indicates the location of their headquarters. Pennsylvania is home to more LZ 200 headquarters than any other state, more than twice as many as the next leading states of Ohio, New York, Minnesota, Michigan, and Illinois. Five of Pennsylvania's multi-site headquarters are among the largest 25.



Organizational Characteristics: System Headquarters

Headquarters' Locations

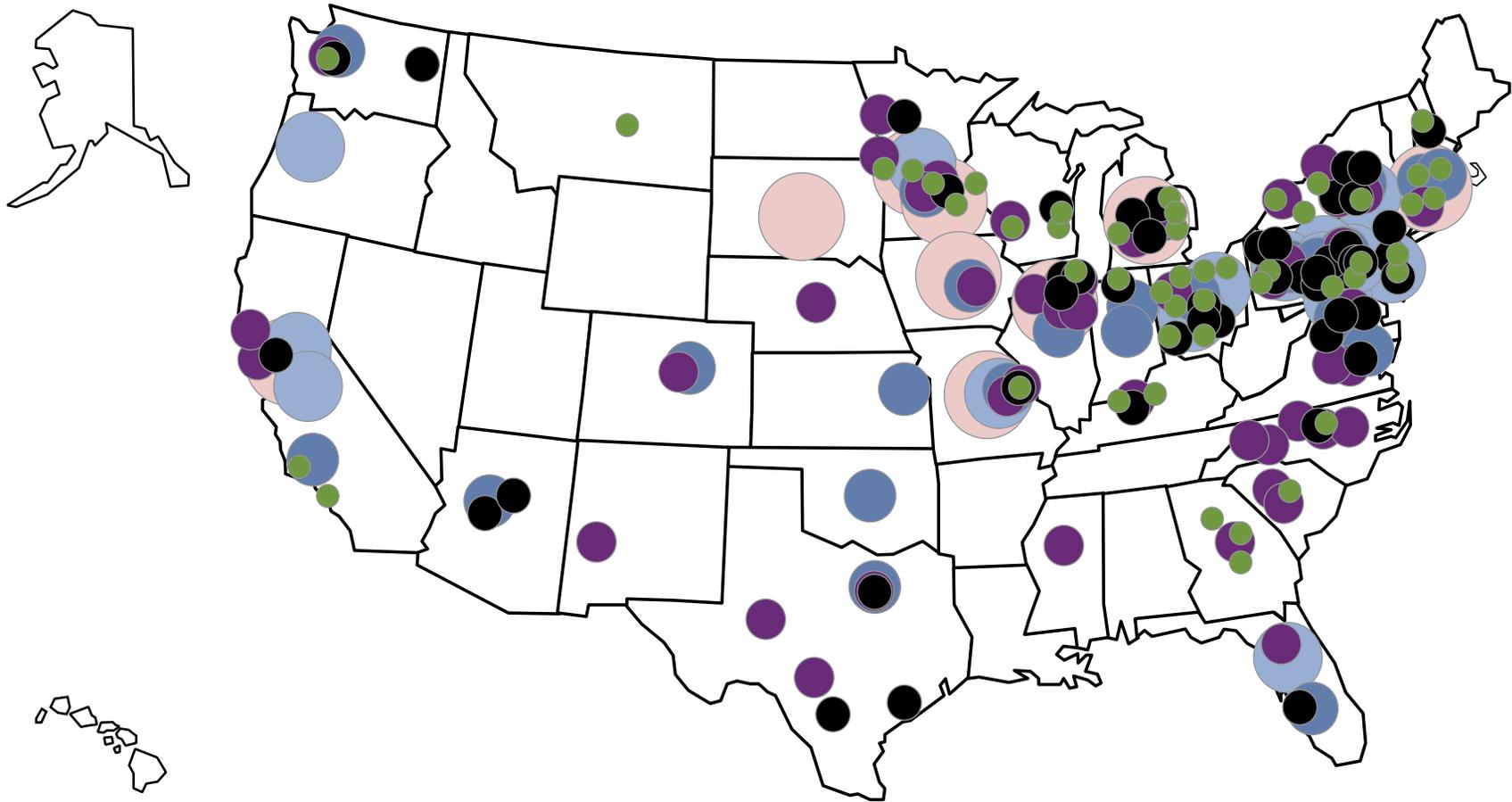


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Organizational Characteristics: System Headquarters

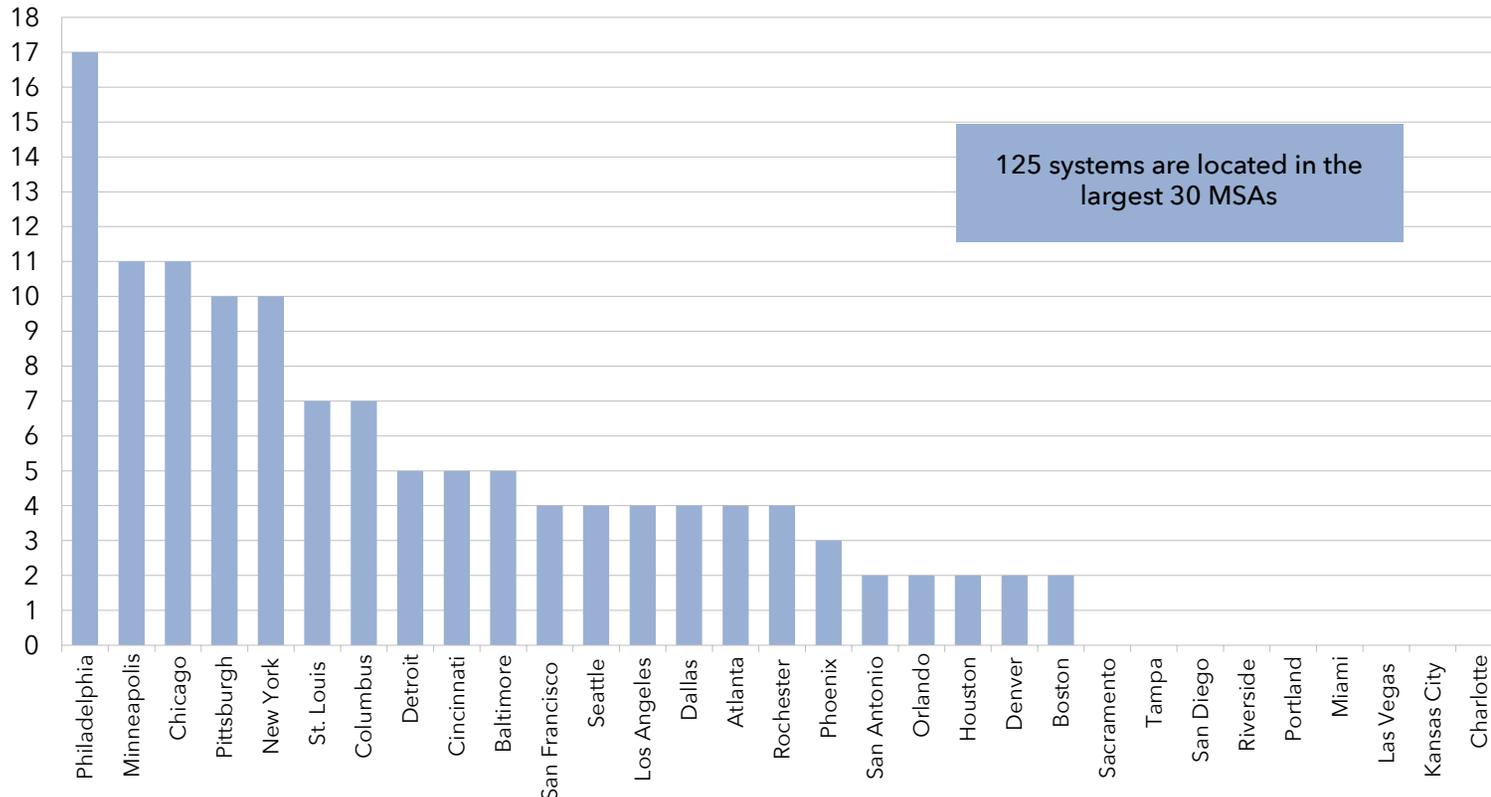
Headquarters' Locations by Size



KEY:



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 2019 data from the U.S. Census Bureau. Areas are identified by county, with several counties making up a MSA. The National Investment Center for the Seniors Housing & Care Industries (NIC) has developed a database that provides a comprehensive tool for understanding supply and demand for the top 125 MSAs called the Market Area Profiles, or MAP™. The MAP™ data and analysis allow management staff of a multi-site access to data on operating performance in their MSAs as well as their defined local market. The locations of the communities owned by LZ 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 #20) – a national system with a disparate geographic distribution of its communities with locations primarily on the West Coast, but two communities in Wisconsin and one in Texas. Retirement Housing Foundation (LZ 200 #12) 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 Services (LZ 200 #3) is classified as an across states system with a focus in the Northeast, Mid-Atlantic and Southeast U.S.
- **Tri-state.** Systems whose communities are located across three states, typically contiguous. Example: Presbyterian Senior Living (LZ 200 #15) has communities located in Delaware, Ohio and Pennsylvania.

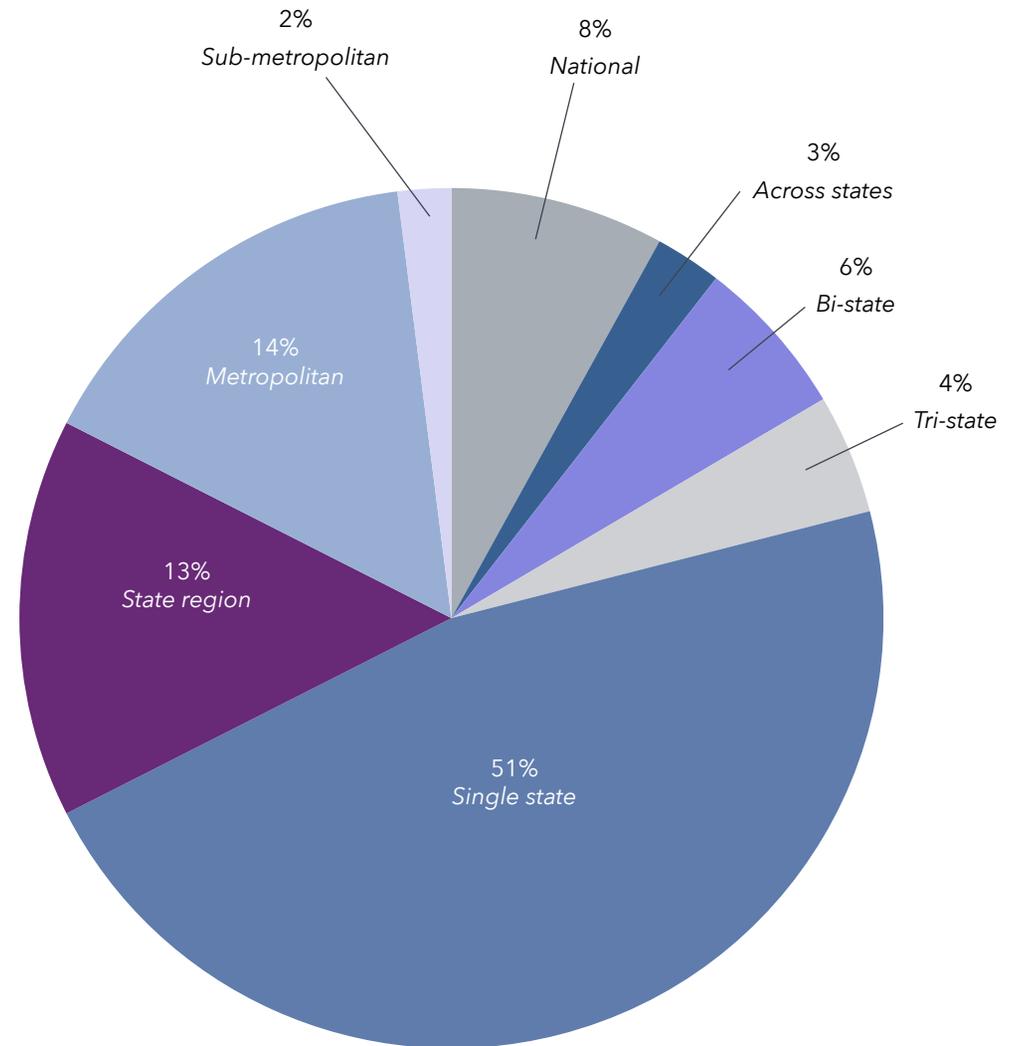
Organizational Characteristics: Geographic Classifications (Continued)

- **Bi-state.** Systems whose communities are located across two states, typically contiguous. Example: Springpoint Senior Living (LZ 200 #25) had all of its communities within New Jersey as of year-end 2016. In 2017, another organization affiliated with Springpoint, which now puts Springpoint communities in both New Jersey and Delaware, a Bi-state designation.
- **Single State.** Systems whose communities are contained within a single state's borders and are spread across the state. Example: Westminster Communities of Florida (LZ 200 #11) – 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 #59)–multiple communities centrally concentrated in Texas.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: Episcopal SeniorLife Communities (LZ 200 #144)–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 House Incorporated (LZ 200 #105) are in the southwestern quadrant of the DC-Arlington metropolitan area.

Organizational Characteristics: Geographic Classifications

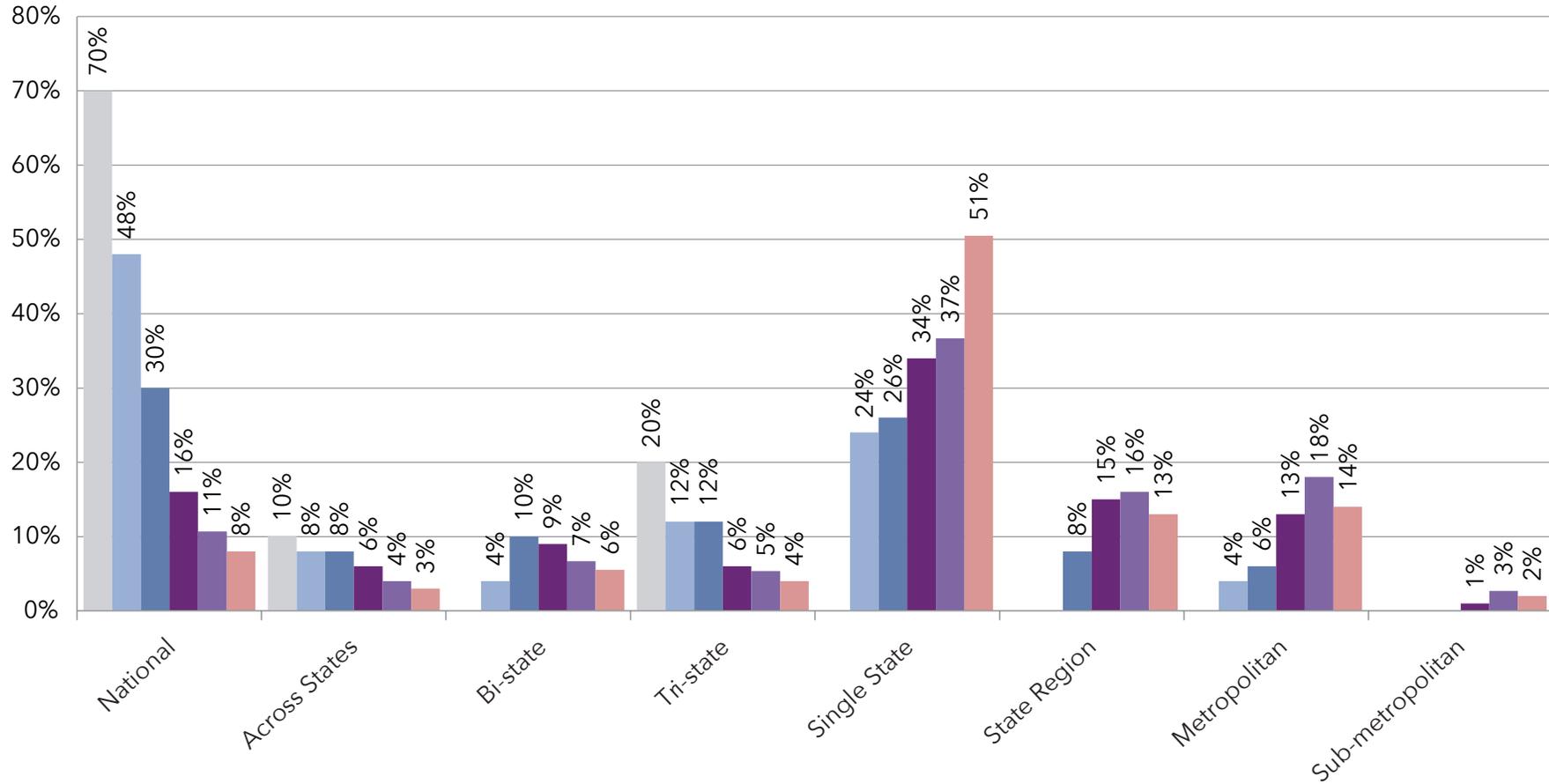
Primary Classifications

Chart 4-6a shows that a large majority, nearly 80%, 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 as of 2018 has affiliated with Elim Care (MN) (who operates in Minnesota and North Dakota), to become Cassia (LZ 200 #13). National multi-sites are 8.0% 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



KEY:

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

Analysis of the Data: Classifications

Secondary Classifications

A multi-site may have a secondary market, as well. For example, bi-state multi-site Lutheran Senior Services (LZ 200 #17) has a secondary metropolitan market in St. Louis. The secondary classification provides a snapshot of a system's geographic concentration of communities. Seventy-one (71) of the LZ 200 systems have such a market concentration. (Chart 4-6c).

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

Organizational Characteristics: Corporate Name Changes in 2019

Corporate Name Changes

An ongoing trend among senior living organizations throughout the country, is that of changing the name of the organization to better reflect the services provided. Section 4-7 lists the 2019 name changes.

2020 Rank	Current System Name	Logo	Previous System Name
10	Benedictine	 Benedictine	Benedictine Health System
89	Baruch	 BARUCH SENIOR MINISTRIES	Baruch Senior Ministries
103	Sun Health Services	 Sun Health [™]	Sun Health Senior Living
115	Mather	 Mather be next ra ordinary	Mather LifeWays
136	The Wesley Communities	 the WESLEY communities	Methodist ElderCare Services
137	Sunset Senior Communities	 Sunset SENIOR COMMUNITIES	Sunset Retirement Communities & Services
180	Avinity	 AVINITY [™] Living with Spirit	Avinity Senior Living

Organizational Characteristics: Debt Ratings

Rated Debt as of 12/31/2019

Ratings

There are currently three rating agencies that rate senior living debt: Fitch Ratings, Standard & Poor's, and Moody's, two of which, Standard & Poor's and Fitch Ratings, are currently active. 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 12/31/19. Sixty (60) of the LZ 200, including two 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, 46%, of the ratings for LZ 200 organizations fall in the "BBB" category (that is, with ratings of "BBB+," "BBB" or "BBB-").

2020 Rank	System Name	State	Rated	
			Fitch	S&P
130	Moorings Park	FL	A	A+
21	Front Porch Communities and Services	CA	A	A-
24	Masonic Villages of the Grand Lodge of Pennsylvania	PA	UNR	A
23	Otterbein Senior Lifestyle Choices	OH	UNR	A
33	Willow Valley Communities	PA	A	UNR
41	Buckner Retirement Services, Inc	TX	A	UNR
Over 200	Three Pillars Senior Living Community	WI	A	UNR
3	Acts Retirement-Services, Inc.	PA	A-	UNR
7	HumanGood	CA	A-	UNR
8	Covenant Retirement Communities	IL	A-	UNR
11	Westminster Communities of Florida	FL	A-	UNR
12	Retirement Housing Foundation	CA	A-	UNR
56	Presbyterian Homes	IL	A-	BBB+
57	Covia Communities	CA	A-	UNR
81	The Presbyterian Homes, Inc.	NC	A-	UNR

Organizational Characteristics: Debt Ratings (Continued)

Rated Debt as 12/31/2019

2020 Rank	System Name	State	Rated	
			Fitch	S&P
103	Sun Health Services fka Sun Health Senior Living LLC	AZ	A-	UNR
108	The RiverWoods Group	NH	A-	UNR
131	Emerald Communities	WA	A-	UNR
159	Episcopal Communities & Services	CA	A-	UNR
Over 200	Sunset Retirement Communities	OH	A-	UNR
66	Immanuel	NE	AA	UNR
22	Concordia Lutheran Ministries	PA	UNR	AA-
15	Presbyterian Senior Living	PA	BBB+	UNR
27	Diakon Lutheran Social Ministries	PA	BBB+	UNR
30	Shell Point Retirement Community	FL	UNR	BBB+
58	Masonicare	CT	BBB+	UNR
99	Givens Estates	NC	BBB+	UNR
105	Goodwin House Incorporated	VA	BBB+	UNR
119	Sunnyside Presbyterian Home	VA	BBB+	UNR
122	Lutheran Social Ministries of New Jersey, Inc.	NJ	BBB+	UNR
9	Lifespace Communities, Inc.	IA	BBB	UNR
16	Asbury Communities, Inc.	MD	BBB	UNR
17	Lutheran Senior Services	MO	BBB	UNR
18	Ohio Living	OH	BBB	UNR
49	BHI Senior Living, Inc.	IN	BBB	UNR
50	Eskaton	CA	UNR	BBB
53	Bethesda Health Group	MO	BBB	UNR

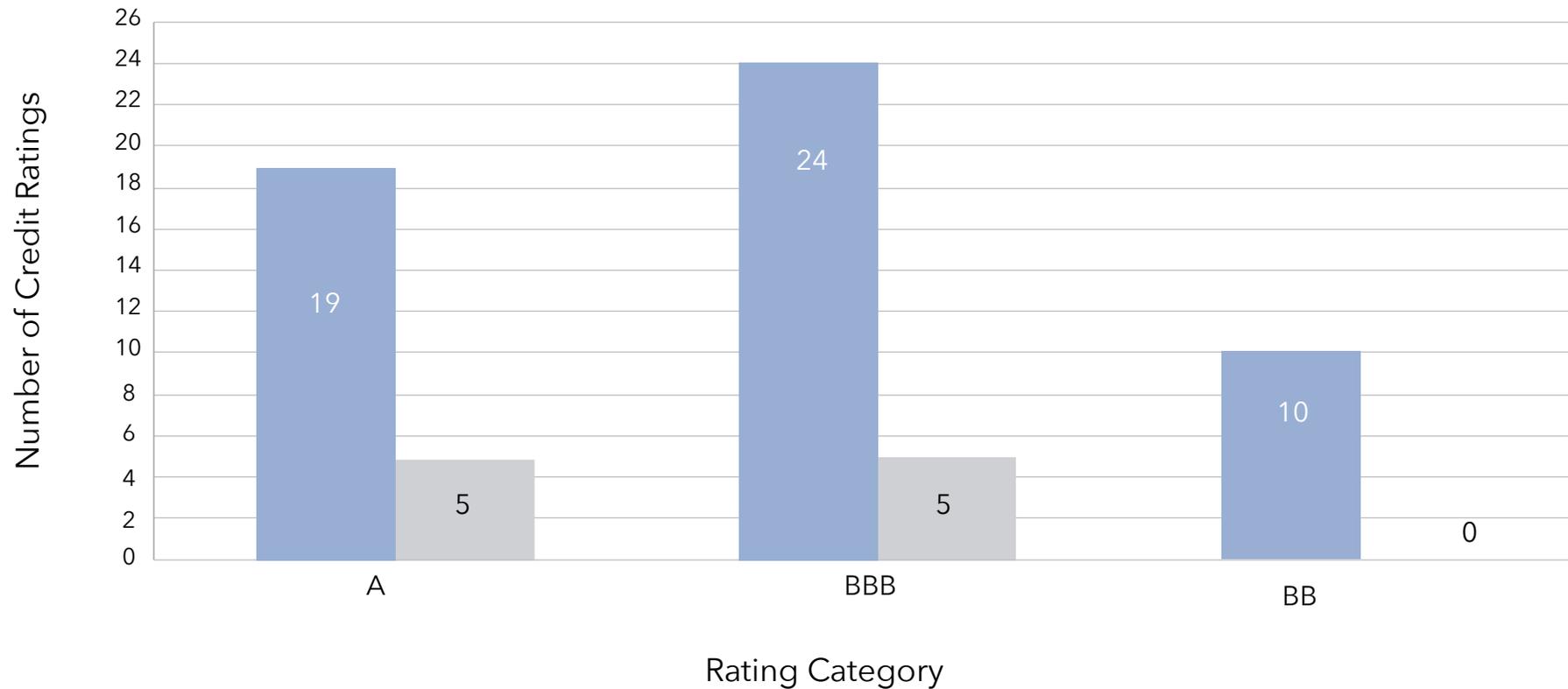
Organizational Characteristics: Debt Ratings (Continued)

Rated Debt as of 12/31/2019

2020 Rank	System Name	State	Rated	
			Fitch	S&P
68	UMRC and Porter Hills	MI	BBB	UNR
87	The United Methodist Retirement Homes, Inc.	NC	BBB	UNR
120	Garden Spot Communities	PA	UNR	BBB
183	The Loomis Communities	MA	UNR	BBB
31	Christian Horizons	MO	BBB-	UNR
40	Franciscan Communities, Inc.	IL	BBB-	UNR
69	Holland Home	MI	BBB-	UNR
90	Haverland Carter Lifestyle Group	NM	BBB-	UNR
101	United Methodist Communities	NJ	BBB-	UNR
110	Landis Communities	PA	BBB-	UNR
113	Messiah Lifeways	PA	BBB-	UNR
111	Life Enriching Communities	OH	BBB-	UNR
127	Brazos Presbyterian Homes	TX	BBB-	UNR
37	Greencroft Communities	IN	BB+	UNR
83	Blue Skies of Texas	TX	BB+	UNR
62	Presbyterian Villages of Michigan	MI	BB+	UNR
86	Friendship Village St. Louis	MO	BB+	UNR
133	Morningside Ministries	TX	BB+	UNR
168	EHM Senior Solutions	MI	BB+	UNR
Over 200	Morningstar Senior Living	PA	BB+	UNR
35	Transforming Age	WA	BB	UNR
67	Wesley Enhanced Living	PA	BB	UNR
126	Christian Care Centers	TX	BB-	UNR

Organizational Characteristics: Debt Ratings

Ratings by Category



53 ratings in "A" & "BBB" Category 10 in "BB" Category
63 total ratings of debt for 60 organizations

KEY: ■ Fitch ■ S&P

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 2019, organizations were grouped into tiers based on their overall revenue. The largest LZ 200 organizations have revenues beyond \$200 million (26 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.

	Number of LZ 200 Organizations	% of Total LZ 200
Tier I: > \$200 million	26	15.9%
Tier II: \$100-\$199 million	29	17.8%
Tier III: \$50-\$99 million	62	38.0%
Tier IV: \$25-\$49 million	42	25.8%
Tier V: < \$25 million	4	2.5%

Analysis of the Data: Revenue

Annual Revenue by Organization

2020 Rank	System	State	Annual Revenue Tier
1	National Senior Campuses	MA	Tier I
2	The Evangelical Lutheran Good Samaritan Society	SD	Tier I
3	ACTS Retirement Services, Inc.	PA	Tier I
4	Ascension Living	MO	Tier I
7	HumanGood	CA	Tier I
6	Trinity Health Senior Communities	MI	Tier I
5	Presbyterian Homes and Services	MN	Tier I
10	Benedictine fka Benedictine Health System	MN	Tier I
44	National Church Residences	OH	Tier I
26	Volunteers of America	VA	Tier I
8	Covenant Living Communities & Services	IL	Tier I
9	Lifespace Communities Inc.	IA	Tier I
14	The Kendal Corporation	PA	Tier I
16	Asbury Communities, Inc.	MD	Tier I
20	Pacific Retirement Services, Inc.	OR	Tier I
27	Diakon Lutheran Social Ministries	PA	Tier I
19	The Carmelite System, Inc.	NY	Tier I
22	Concordia Lutheran Ministries	PA	Tier I
15	Presbyterian Senior Living	PA	Tier I
11	Westminster Communities of Florida	FL	Tier I
45	Hebrew SeniorLife	MA	Tier I
17	Lutheran Senior Services	MO	Tier I
18	Ohio Living	OH	Tier I
25	Springpoint Senior Living Inc.	NJ	Tier I
24	Masonic Villages of the Grand Lodge of Pennsylvania	PA	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 is only for those that provided it

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2020 Rank	System	State	Annual Revenue Tier
21	Front Porch Communities and Services	CA	Tier I
107	The New Jewish Home	NY	Tier II
23	Otterbein SeniorLife	OH	Tier II
57	Covia Communities	CA	Tier II
46	Presbyterian SeniorCare Network	PA	Tier II
58	Masonicare	CT	Tier II
32	Ecumen	MN	Tier II
50	Eskaton	CA	Tier II
76	Lutheran SeniorLife	PA	Tier II
69	Holland Home	MI	Tier II
40	Franciscan Communities, Inc.	IL	Tier II
29	Presbyterian Manors of Mid-America, Inc.	KS	Tier II
47	Lutheran Life Communities	IL	Tier II
66	Immanuel	NE	Tier II
68	UMRC and Porter Hills	MI	Tier II
30	Shell Point Retirement Community	FL	Tier II
56	Presbyterian Homes	IL	Tier II
93	Sequoia Living, Inc	CA	Tier II
35	Transforming Age	WA	Tier II
72	Phoebe Ministries	PA	Tier II
61	Lutheran Services Carolinas	NC	Tier II
36	WesleyLife	IA	Tier II
34	Homewood Retirement Centers Inc.	MD	Tier II
33	Willow Valley Communities	PA	Tier II
51	United Church Homes, Inc.	OH	Tier II

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million
Revenue is only for those that provided it

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2020 Rank	System	State	Annual Revenue Tier
70	SpiriTrust Lutheran	PA	Tier II
125	Samaritas	MI	Tier II
178	St. Paul's Episcopal Home, Inc.	CA	Tier II
74	Ingleside	MD	Tier II
85	Felician Services, Inc.	IL	Tier II
53	Bethesda Health Group, Inc	MO	Tier III
65	American Baptist Homes of the Midwest	MN	Tier III
55	Providence Life Services	IL	Tier III
105	Goodwin House Incorporated	VA	Tier III
130	Moorings Park	FL	Tier III
59	Methodist Retirement Communities	TX	Tier III
73	Eventide	MN	Tier III
64	Heritage Ministries	NY	Tier III
82	Saint Therese	MN	Tier III
63	LifeSpire of Virginia	VA	Tier III
88	Liberty Lutheran Services	PA	Tier III
77	Pinnacle Living	VA	Tier III
133	Christian Health Care Center	NJ	Tier III
80	Lutheran Homes of SC	SC	Tier III
101	United Methodist Communities	NJ	Tier III
92	United Church Homes and Services	NC	Tier III
122	Lutheran Social Ministries of New Jersey, Inc.	NJ	Tier III
49	BHI Senior Living Inc	IN	Tier III
39	Bethesda Senior Living Communities	CO	Tier III
81	The Presbyterian Homes, Inc.	NC	Tier III

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million
Revenue is only for those that provided it

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2020 Rank	System	State	Annual Revenue Tier
98	St. Ann's of Greater Rochester, Inc.	NY	Tier III
158	Ebenezer Society	MN	Tier III
75	Friendship Senior Options	IL	Tier III
79	Walker Methodist	MN	Tier III
87	The United Methodist Retirement Homes, Inc.	NC	Tier III
67	Wesley Enhanced Living	PA	Tier III
37	Greencroft Communities	IN	Tier III
103	Sun Health Services fka Sun Health Senior Living LLC	AZ	Tier III
96	Christian Living Communities	CO	Tier III
28	Christian Care Companies	AZ	Tier III
94	Wesley	WA	Tier III
78	United Methodist Homes	NY	Tier III
97	St. John's	NY	Tier III
84	Presbyterian Communities of South Carolina	SC	Tier III
54	Mississippi Methodist Senior Services, Inc.	MS	Tier III
62	Presbyterian Village of Michigan	MI	Tier III
99	Givens Communities	NC	Tier III
159	Episcopal Communities & Services	CA	Tier III
151	Genacross Lutheran Services	OH	Tier III
154	Episcopal Retirement Services	OH	Tier III
117	National Lutheran Communities & Services	MD	Tier III
90	Haverland Carter Lifestyle Group	NM	Tier III
156	Sholom	MN	Tier III
111	Life Enriching Communities	OH	Tier III
124	United Church of Christ Homes	PA	Tier III

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million
Revenue is only for those that provided it

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2020 Rank	System	State	Annual Revenue Tier
100	Masonic Homes of Kentucky	KY	Tier III
71	Western Home Services	IA	Tier III
131	Emerald Communities	WA	Tier III
177	Knute Nelson	MN	Tier III
102	St. Andrew's Resources for Seniors System	MO	Tier III
95	Christian Care Communities	KY	Tier III
41	Buckner Retirement Services, Inc.	TX	Tier III
109	Lutheran Social Ministries of Maryland	MD	Tier III
114	Simpson Senior Servies	PA	Tier III
108	The RiverWoods Group	NH	Tier III
86	Friendship Villages of St. Louis	MO	Tier III
136	The Wesley Communities fka Methodist ElderCare Services	OH	Tier III
83	Blue Skies of Texas	TX	Tier III
115	Mather fka Mather LifeWays	IL	Tier III
113	Messiah Lifeways	PA	Tier III
112	Luthercare	PA	Tier III
145	Wellspring Lutheran Services	MI	Tier III
104	Menno Haven, Inc.	PA	Tier IV
106	Living Branches	PA	Tier IV
160	Bethel	NY	Tier IV
162	Friendly Senior Living	NY	Tier IV
142	Baptist Homes Society	PA	Tier IV
48	Baptist Village Communities	OK	Tier IV
140	Smith Senior Living	IL	Tier IV
118	The Ohio Masonic Home	OH	Tier IV

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million
 Revenue is only for those that provided it

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2020 Rank	System	State	Annual Revenue Tier
132	Morningside Ministries	TX	Tier IV
119	Sunnyside Presbyterian Home	VA	Tier IV
91	Oakwood Lutheran Senior Ministries, Inc.	WI	Tier IV
110	Landis Communities	PA	Tier IV
152	St. John's Lutheran Ministries, Inc.	MT	Tier IV
135	Maple Knoll Communities, Inc.	OH	Tier IV
120	Garden Spot Communities	PA	Tier IV
185	Beechwood Health Care Center, Inc.	NY	Tier IV
186	Michigan Masonic Homes	MI	Tier IV
193	A.G. Rhodes Health & Rehab	GA	Tier IV
89	Baruch fka Baruch Senior Ministries	MI	Tier IV
173	Presbyterian Homes of Georgia	GA	Tier IV
147	CRISTA Senior Living	WA	Tier IV
128	Benevolent Corporation Cedar Community	WI	Tier IV
126	Christian Care Centers	TX	Tier IV
143	Episcopal SeniorLife Communities	NY	Tier IV
171	Redstone Presbyterian SeniorCare	PA	Tier IV
166	Medford Leas	NJ	Tier IV
137	Sunset Senior Communities fka Sunset Retirement Communities & Services	MI	Tier IV
127	Brazos Presbyterian Homes Inc.	TX	Tier IV
129	Vista Prairie Communities	MN	Tier IV
190	Parker Health Group, Inc.	NJ	Tier IV
170	Lutheran Life Villages	IN	Tier IV
155	Friends Homes, Inc.	NC	Tier IV
139	LifeStream Complete Senior Living, Inc.	AZ	Tier IV

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million
Revenue is only for those that provided it

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2020 Rank	System	State	Annual Revenue Tier
194	Colonial Senior Services, Inc	OH	Tier IV
146	Luther Manor	WI	Tier IV
197	Saint Mary's Home of Erie	PA	Tier IV
175	Bethany St. Joseph Corporation	WI	Tier IV
168	Rockwood Retirement Communities	WA	Tier IV
12	Retirement Housing Foundation	CA	Tier IV
157	Havenwood Heritage Heights	NH	Tier IV
184	Allegheny Lutheran Social Ministries	PA	Tier IV
183	The Loomis Communities	MA	Tier IV
192	Jewish Senior Life of Metropolitan Detroit	MI	Tier V
134	United Methodist Memorial Home	IN	Tier V
196	Clark Retirement Community, Inc.	MI	Tier V
191	Skaalen Retirement Services	WI	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 is only for those that provided it

Analysis of the Data: Corporate Structure

Most Common Corporate Positions Created in 2019

Corporate Staff

Yet another area of the 2020 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 Operating Officer	14
Chief Clinical/Health Officer	9
Chief Information/Technology Officer	8
Sales & Marketing	8
Workforce Development/Retention/Training	8
Human Resource/Benefits	7
Compliance Officer	6
Chief Strategy Officer	6
Chef/Culinary Excellence	5
Chief Financial Officer/Finance Manager	5
Executive Director/Administrative	4

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

2020 Rank	System Name	State	As of 12/31/2019	Previous
CEO				
2	The Evangelical Lutheran Good Samaritan Society	SD	Randy Bury	David Horazdovsky
9	Lifespace Communities	IA	Larry Smith	Sloan Bentley
15	Presbyterian Senior Living	PA	Jim Bernardo	Steve Proctor
24	Masonic Villages of the Grand Lodge of Pennsylvania	PA	William L. Kingsbury	Joseph E. Murphy
43	Covenant Health	MA	Stephen Grubbs	David R. Lincoln
59	Methodist Retirement Communities	TX	Alan Brown	Don Stephens
68	UMRC and Porter Hills	MI	Stephen Fetyko	John Thorhauer
84	Presbyterian Communities of South Carolina	SC	L. Franklin Fant	Katherine R. Ligon
93	Sequoia Living, Inc.	CA	Sara McVey	David Berg
105	Goodwin House Incorporated	VA	Rob Liebreich	Kathy Anderson
119	Sunnyside Presbyterian Home	VA	Josh Lyons	John 'Jack' Broaduss
147	CRISTA Senior Living	WA	Glen Melin	Mark Longenecker
197	Saint Mary's Home of Erie	PA	Allen Bonace	Sr. Phyllis McCracken
CFO				
3	Acts Retirement Services, Inc.	PA	Richard Winter	Karen Christiansen
7	HumanGood	CA	Andy McDonald	Pamela S. Claassen
22	Concordia Lutheran Ministries	PA	Michael J. Falbo	Kim Young
30	Shell Point Retirement Community	FL	Burke Rainey	Tim Lochridge
32	Ecumen	MN	Morshed Alam	Scott McGuire
37	Greencroft Communities	IN	Lynda Olinski	Robert Gibson
43	Covenant Health	MA	Stephen Forney	Stephen Grubbs
68	UMRC and Porter Hills	MI	Kim Hoppe	Stephen Fetyko
70	SpiriTrust Lutheran	PA	Vacant	Bena Rossi
84	Presbyterian Communities of South Carolina	SC	W. Chad Melven	Ashley C. Taylor

Analysis of the Data: Corporate Structure (Continued)

Corporate Staffing Changes

2020 Rank	System Name	State	As of 12/31/2019	Previous
CFO (continued)				
103	Sun Health Services fka Sun Health Senior Living	AZ	Sharon A. Grambow	William Sellner
126	Christian Care Centers	TX	Mark Spencer	Doug Harrison
145	Wellspring Lutheran Services	MI	Timothy Kalbfleisch	Amy Storms
147	CRISTA Senior Living	WA	Lynn Norton	Glen Melin
178	St. Paul's Episcopal Home, inc.	CA	Randall Sanner	Vacant
194	Colonial Senior Services	OH	Brian Krause	Mark Zoellner
COO				
2	The Evangelical Lutheran Good Samaritan Society	SD	Nathan Schema	Thomas Arthur Syverson
3	Acts Retirement Services, Inc.	PA	Charles W. Coxson, III	Vacant
8	Covenant Living Communities and Services	IL	Jody Holt	Scott Moore
32	Ecumen	MN	Brett Anderson	Vacant
51	United Church Homes, Inc.	OH	Terry Spitznagel	Charles Mooney
103	Sun Health Services fka Sun Health Senior Living	AZ	Tahlya Visintainer	Vacant
107	The New Jewish Home	NY	Vacant	Jacob Victory
125	Samaritas	MI	Kimberly Thompson	Karen Monday
126	Christian Care Centers	TX	Kim Cook	Doug Harrison
129	Vista Prairie Communities	MN	Scott Hamman	Kim Webster
CIO/CTO				
32	Ecumen	MN	Vacant	Bill McGarry
78	United Methodist Homes	NY	Vacant	Randy Reynolds
107	The New Jewish Home	NY	Nancy Stoddard	Nancy Stoddard
120	Garden Spot Communities	PA	Andrew Dietzel	Vacant
124	United Church of Christ Homes	PA	Neil Weiser	Richard Hower

Analysis of the Data: Corporate Structure

Corporate Tenure

Position	Average Tenure (years)	n*
CEO	11.09	139
CFO	8.60	132
COO	5.76	85
CIO	7.28	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. 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 4-11 a-b. A total of 192 communities within the LZ 200 are accredited through CARF; 29 have sought accreditation through JCAHO, and an additional 36 are accredited through EAGLE.

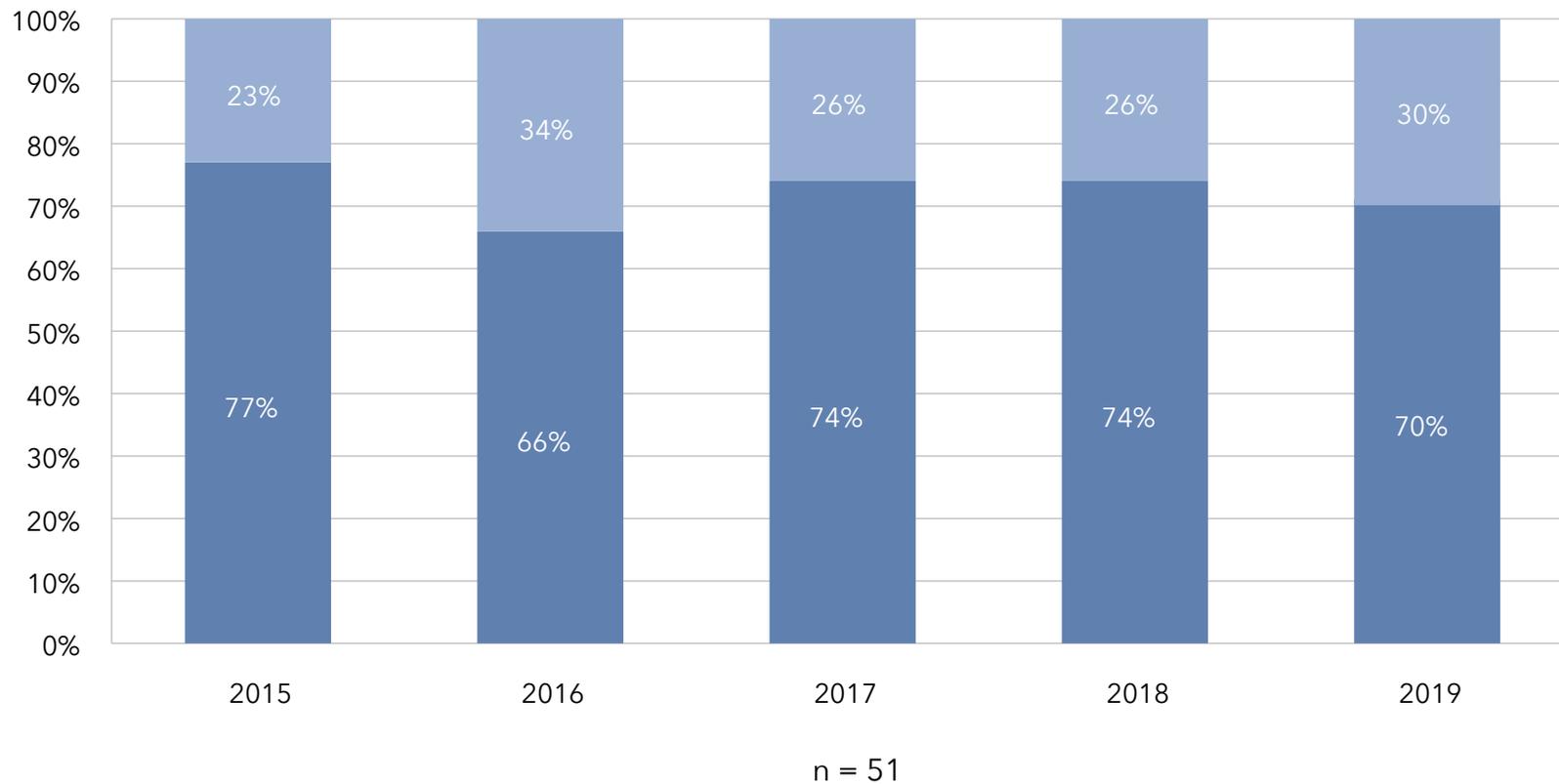
Organizational Characteristics: Accreditation (Continued)

Accredited Communities

2020 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
15	Presbyterian Senior Living	PA	31	0	0
3	ACTS Retirement Services, Inc.	PA	26	0	0
46	Presbyterian SeniorCare Network	PA	20	0	0
22	Concordia Lutheran Ministries	PA	14	0	0
14	The Kendal Corporation	PA	9	2	0
44	National Church Residences	OH	9	0	0
25	Springpoint Senior Living Inc.	NJ	7	1	0
16	Asbury Communities, Inc.	MD	6	0	6
197	Saint Mary's Home of Erie	PA	6	0	0
57	Covia Communities	CA	4	0	0
77	Pinnacle Living	VA	4	0	0
184	Allegheny Lutheran Social Ministries	PA	3	0	0
49	BHI Senior Living Inc	IN	3	0	0
74	Ingleside	MD	3	0	0
56	Presbyterian Homes	IL	3	0	0
171	Redstone Presbyterian SeniorCare	PA	3	0	0
93	Sequoia Living, Inc	CA	3	0	0
183	The Loomis Communities	MA	3	0	0
81	The Presbyterian Homes, Inc.	NC	3	0	0
83	Blue Skies of Texas	TX	2	1	0
168	Rockwood Retirement Communities	WA	2	0	2
127	Brazos Presbyterian Homes Inc.	TX	2	0	0
154	Episcopal Retirement Services	OH	2	0	0
75	Friendship Senior Options	IL	2	0	0
99	Givens Communities	NC	2	0	0
105	Goodwin House Incorporated	VA	2	0	0

2020 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
157	Havenwood Heritage Heights	NH	2	0	0
45	Hebrew SeniorLife	MA	2	0	0
166	Medford Leas	NJ	2	0	0
130	Moorings Park	FL	2	0	0
140	Smith Senior Living	IL	2	0	0
43	Covenant Health	MA	1	1	0
1	National Senior Campuses	MA	1	1	0
116	Wesley Willows	IL	1	0	1
110	Landis Communities	PA	1	0	0
109	Lutheran Social Ministries of Maryland	MD	1	0	0
58	Masonicare	CT	1	0	0
108	The RiverWoods Group	NH	1	0	0
26	Volunteers of America	VA	1	0	0
55	Providence Life Services	IL	0	7	0
40	Franciscan Communities, Inc.	IL	0	6	0
47	Lutheran Life Communities	IL	0	5	1
107	The New Jewish Home	NY	0	2	0
200	Cornerstone Village	TN	0	1	0
28	Christian Care Companies	AZ	0	1	0
133	Christian Health Care Center	NJ	0	1	0
84	Felician Services, Inc.	IL	0	1	0
23	Otterbein SeniorLife	OH	0	0	14
101	United Methodist Communities	NJ	0	0	9
68	UMRC and Porter Hills	MI	0	0	3
30	Shell Point Retirement Community	FL	0	0	1

Organizational Characteristics: Accreditation At Least One Accredited Community



KEY:

■ Not Accredited ■ Accredited

192 Accredited Communities through CARF

30 Accreditations through JCAHO

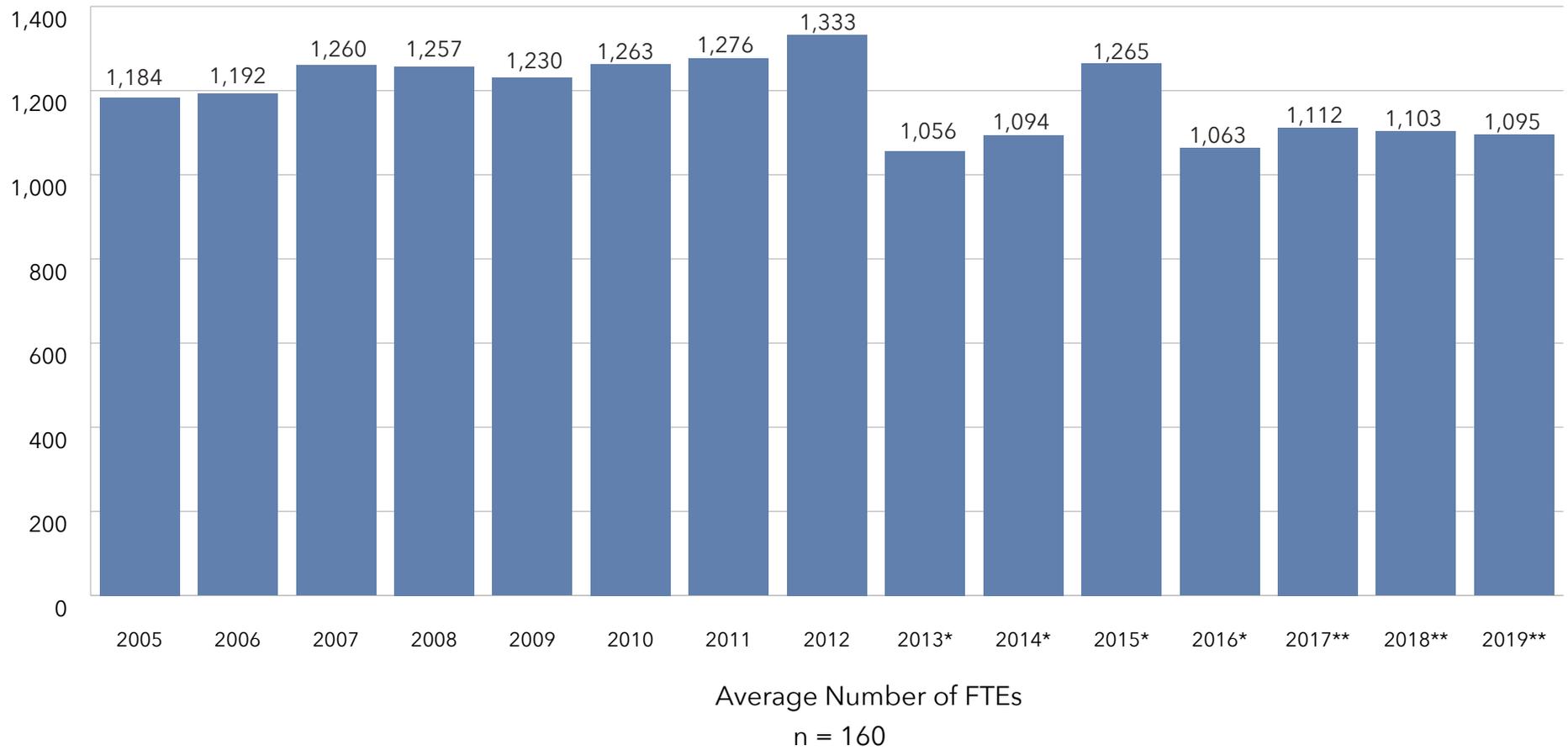
36 Accreditations through EAGLE

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

Organizational Characteristics: Staffing

Average Number of Employees, 2005-2019

2019** Average FTE/Resident: .60



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

**2017, 2018 and 2019 reflect changes to the largest 200 organizations

Analysis of the Data: Staffing

Summary of Employees, 2010-2019

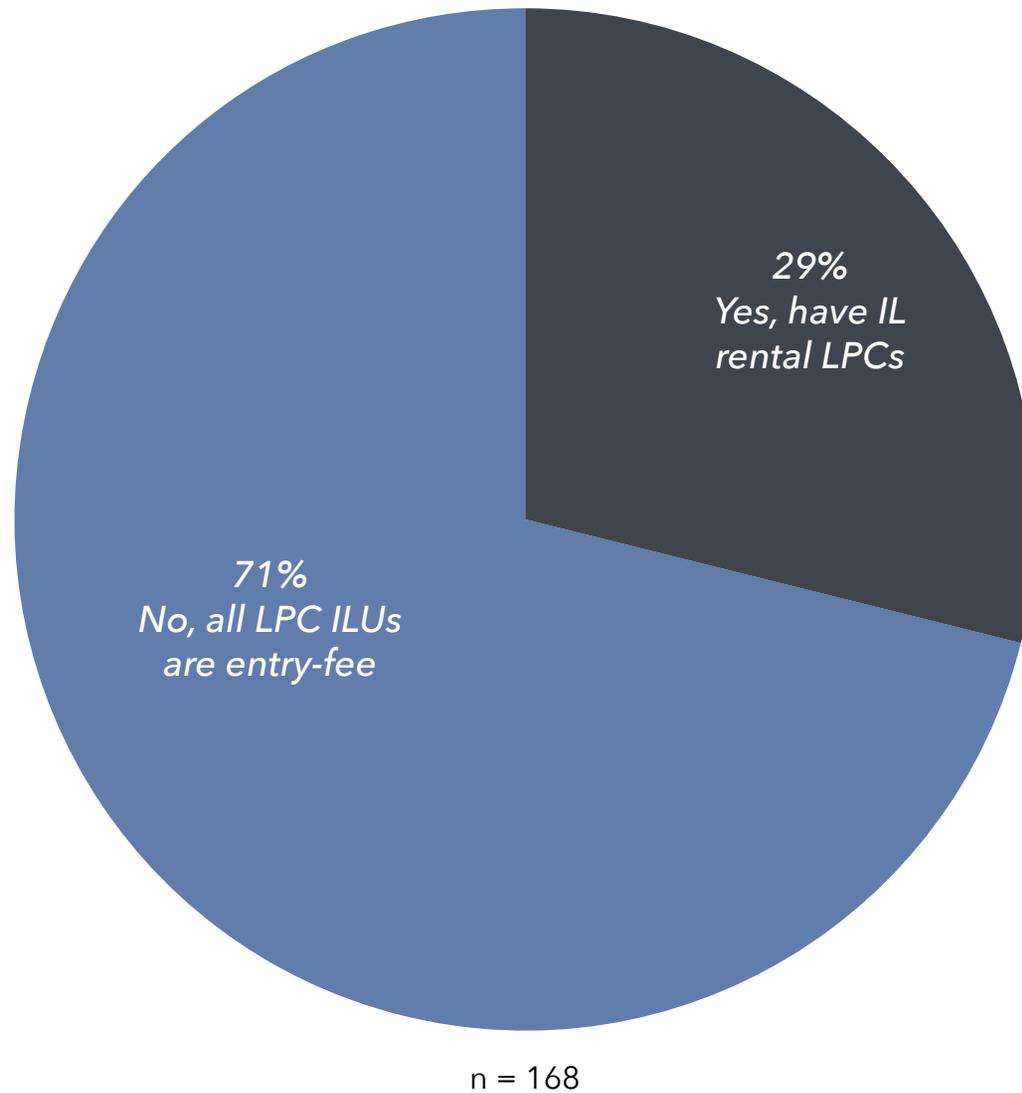
Staffing

The LZ 200 analyses include an examination of the number of full-time equivalents (FTEs) each organization employs. An average of 1,095 FTEs were employed per organization throughout 2019. Note that the number of FTEs decreased in 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 2019 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/unit n=85	1,056	0.68
2014* avg FTE/unit n=123	1,093	0.58
2015* avg FTE/unit n=123	1,265	0.61
2016* avg FTE/unit n=129	1,063	0.62
2017** avg FTE/unit n=162	1,112	0.67
2018** avg FTE/unit n=161	1,103	0.63
2019** avg FTE/unit n=160	1,095	0.60

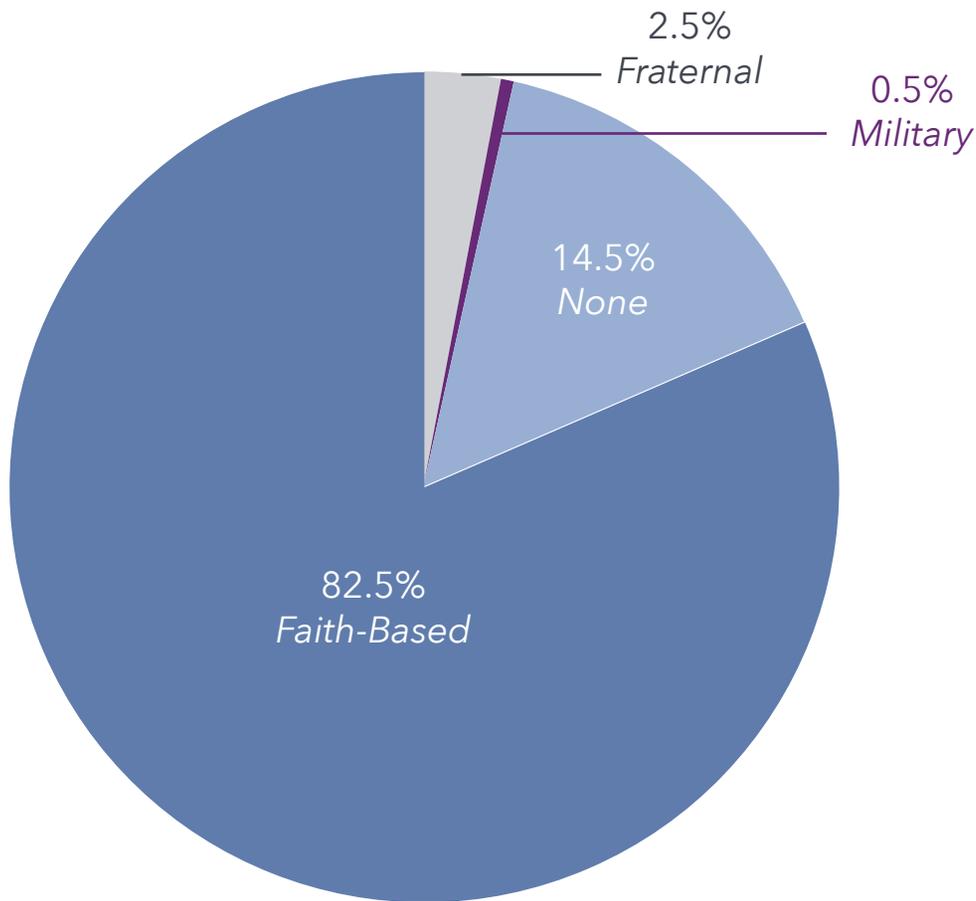
*Reflects change to LZ 150 with the 2014 report
 **Reflects change to LZ 200 with the 2018 report

Organizational Characteristics: Rental LPCs
Organizations with LPC Rental IL Option



Analysis of the Data: Affiliations

Affiliation by Total Number of Systems

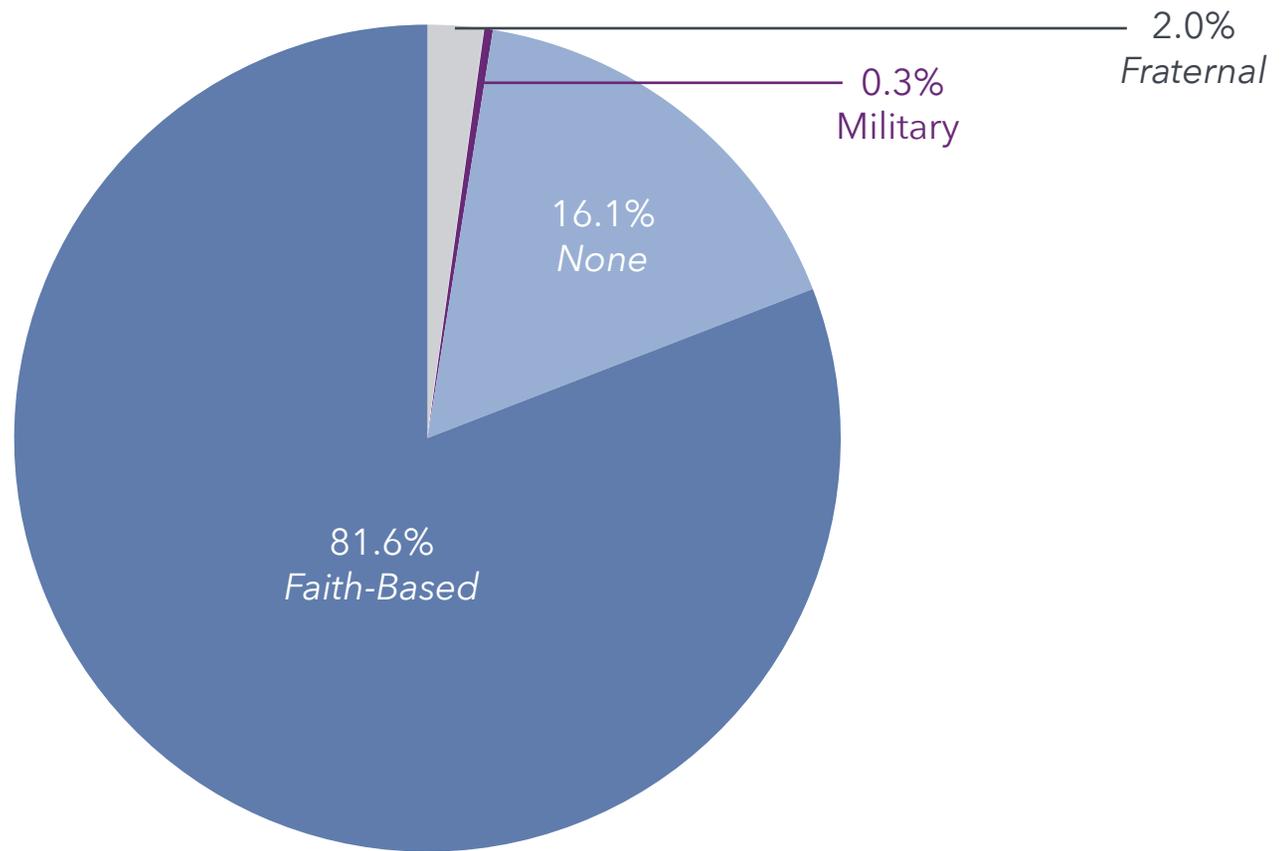


Affiliation

Eighty-two percent (82%) of the LZ 200 organizations have an affiliation with a religious organization, predominantly Lutheran, Presbyterian, and Catholic, or a fraternal or military group (Chart 4-14a). Lutheran organizations represent the largest number, with nearly 50,000 units. Presbyterian affiliation follows with nearly 40,000 units.

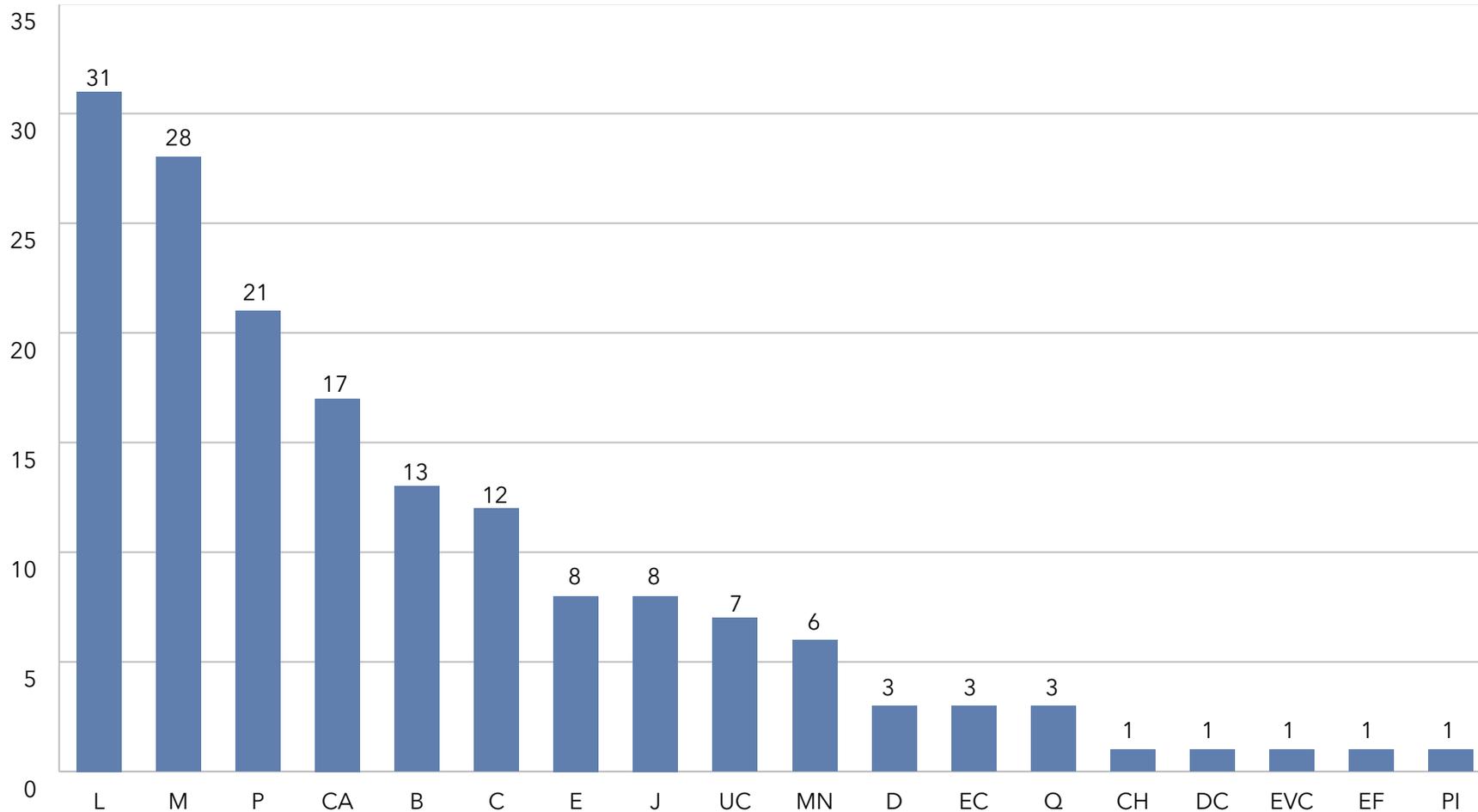
Analysis of the Data: Affiliations

Affiliation by Total Number of Units



Analysis of the Data: Affiliations

Faith-Based Affiliations, by Total Number of Systems



Religions

B Baptist
C Christian
CA Catholic

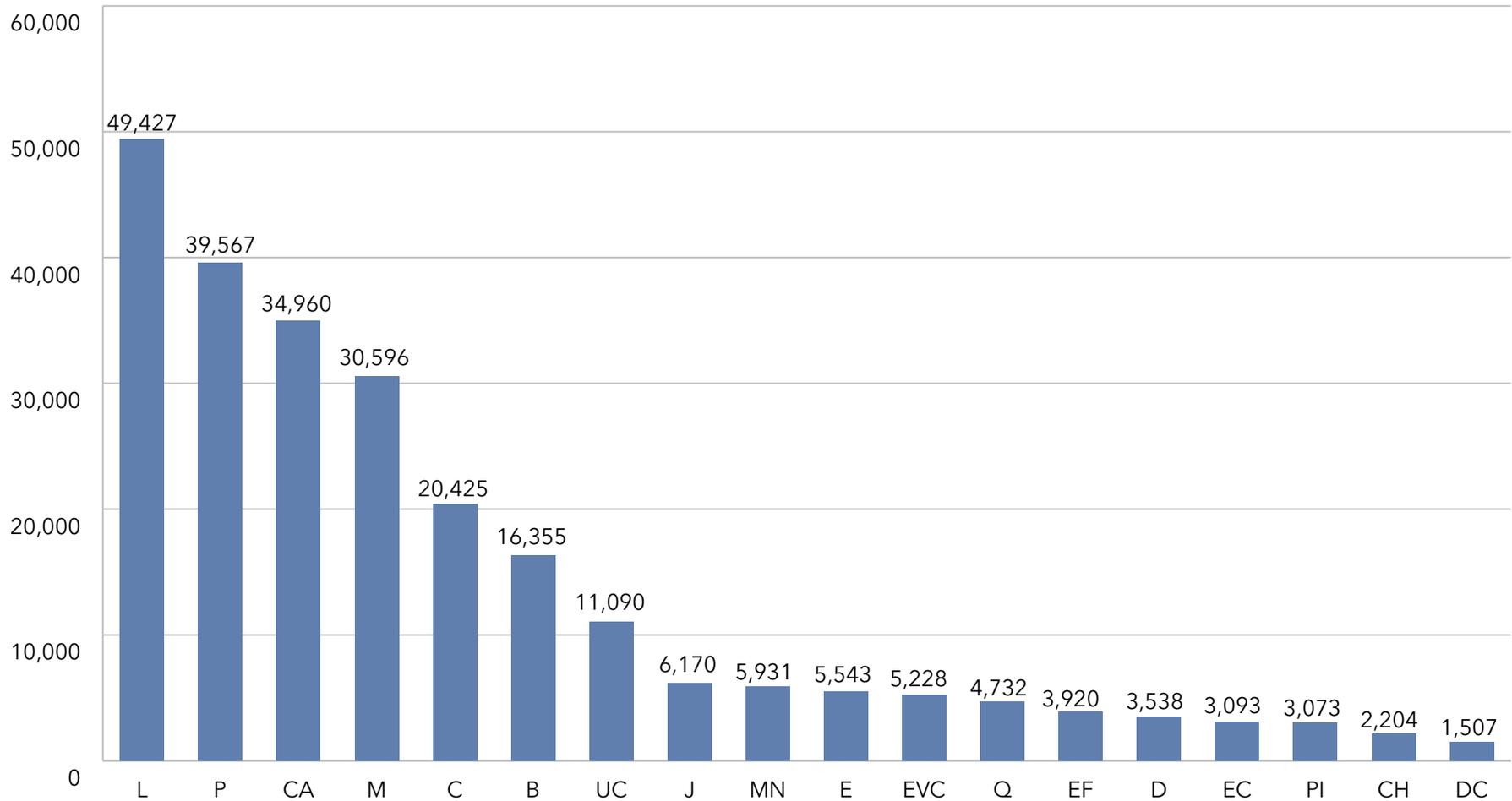
CH Christian and Missionary Alliance
D Dutch Reformed
DC Disciples of Christ Church
E Episcopal
EC Ecumenical

EF Evangelical Free
EVC Evangelical Covenant
J Jewish
L Lutheran
M Methodist

MN Mennonite
P Presbyterian
PI Presbyterian Influenced
Q Quaker
UC United Church of Christ

Analysis of the Data: Affiliations

Faith-Based Affiliations, by Total Units



KEY: Religions

B Baptist
C Christian
CA Catholic

CH Christian and Missionary Alliance
D Dutch Reformed
DC Disciples of Christ Church
E Episcopal
EC Ecumenical

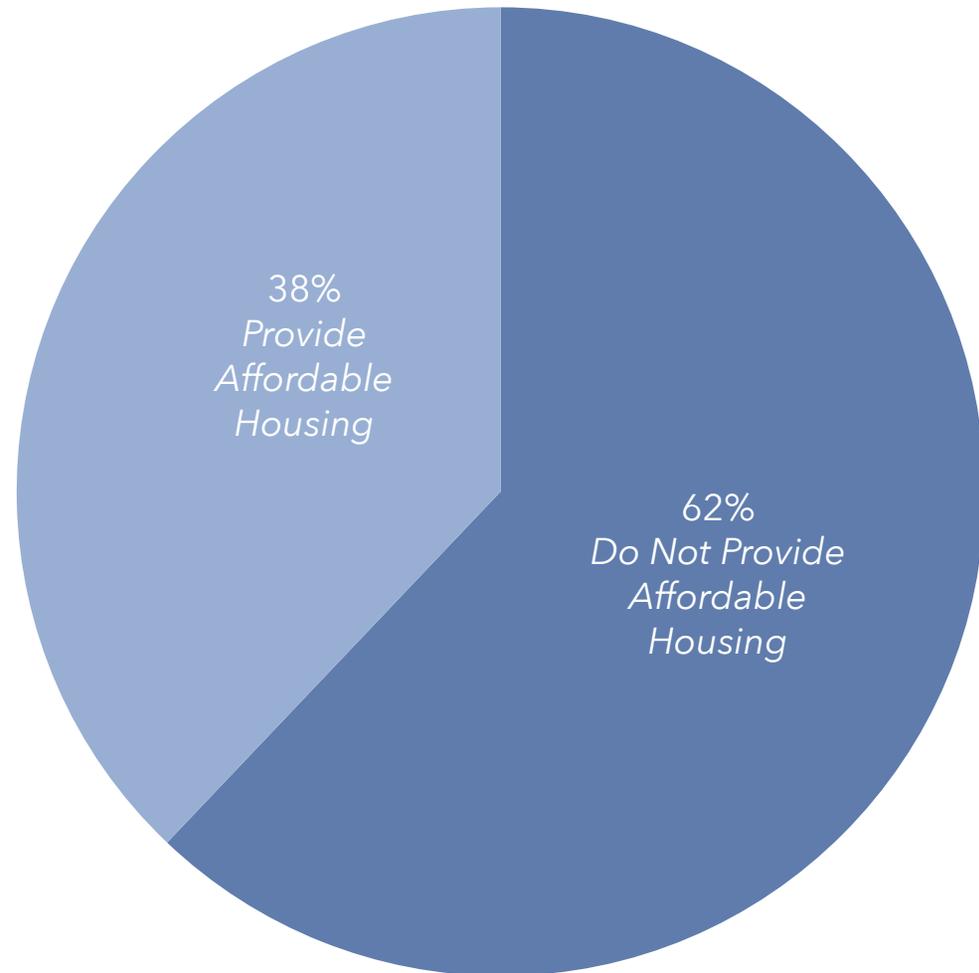
EF Evangelical Free
EVC Evangelical Covenant
J Jewish
L Lutheran
M Methodist

MN Mennonite
P Presbyterian
PI Presbyterian Influenced
Q Quaker
UC United Church of Christ

Organizational Characteristics: Affordable Housing *Percentage Providing Affordable Housing*

Affordable Housing

The ranking of the LZ 200 organizations by the number of affordable (non-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 and Chapter 6 detail these listings further. The data reveal that among the LZ 200, thirty-eight percent (38%) have affordable housing units.



n = 77

Organizational Characteristics: Affordable Housing *Comparison of Market-Rate Units Vs. Affordable Units of Housing Providers*



n = 77

Organizational Characteristics: Managed Units & Communities

Providers that Manage, Ranked by Managed-Only Units

LZ 200 Managed Rank	2020 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
1	158	Ebenezer Society	MN	7,991	89
2	44	National Church Residences	OH	3,439	58
3	2	The Evangelical Lutheran Good Samaritan Society	SD	2,158	21
4	7	HumanGood	CA	2,035	30
5	50	Eskaton	CA	1,950	30
6	32	Ecumen	MN	1,704	21
7	21	Front Porch Communities and Services	CA	1,642	24
8	51	United Church Homes, Inc.	OH	1,476	12
9	96	Christian Living Communities	CO	1,356	15
10	62	Presbyterian Village of Michigan	MI	928	7
11	65	American Baptist Homes of the Midwest	MN	824	1
12	46	Presbyterian SeniorCare Network	PA	729	12
13	20	Pacific Retirement Services, Inc.	OR	712	2
14	13	Cassia	MN	638	12
15	81	The Presbyterian Homes, Inc.	NC	561	1
16	19	The Carmelite System, Inc.	NY	467	2
17	24	Masonic Villages of the Grand Lodge of Pennsylvania	PA	463	1
18	58	Masonicare	CT	375	8
19	102	St. Andrew's Resources for Seniors System	MO	361	2
20	145	Wellspring Lutheran Services	MI	360	11
21	6	Trinity Health Senior Communities	MI	344	22
22	79	Walker Methodist	MN	333	5
23	17	Lutheran Senior Services	MO	274	5
24	40	Franciscan Communities, Inc.	IL	243	2
25	159	Episcopal Communities & Services	CA	212	5

Organizational Characteristics: Managed Units & Communities (Continued)

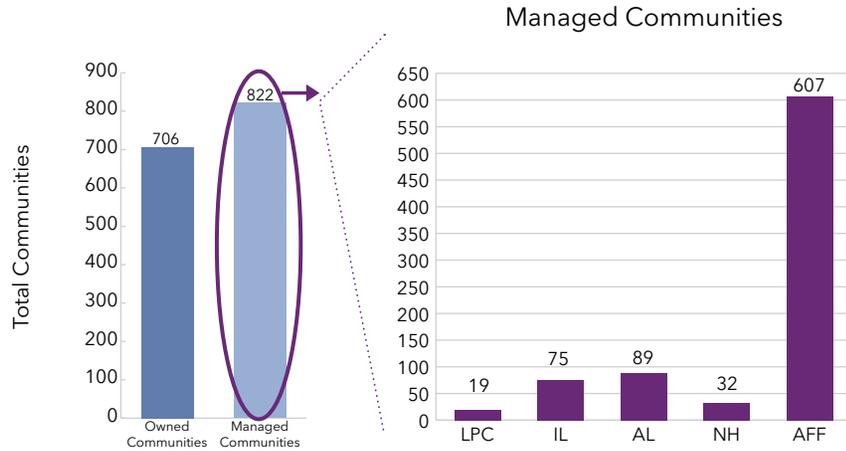
Providers that Manage, Ranked by Managed-Only Units

LZ 200 Managed Rank	2020 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
26	49	BHI Senior Living Inc	IN	199	2
27	71	Western Home Services	IA	196	8
28	125	Samaritas	MI	189	6
29	53	Bethesda Health Group, Inc	MO	182	2
30	122	Lutheran Social Ministries of New Jersey, Inc.	NJ	170	2
31	187	Council for Jewish Elderly	IL	165	1
32	105	Goodwin House Incorporated	VA	161	1
33	152	St. John's Lutheran Ministries, Inc.	MT	160	2
34	177	Knute Nelson	MN	143	5
35	175	Bethany St. Joseph Corporation	WI	135	3
36	142	Baptist Homes Society	PA	109	1
37	57	Covia Communities	CA	107	1
38	55	Providence Life Services	IL	86	1
39	5	Presbyterian Homes and Services	MN	80	1
40	143	Episcopal SeniorLife Communities	NY	69	5
41	89	Baruch fka Baruch Senior Ministries	MI	66	2
42	154	Episcopal Retirement Services	OH	66	1
43	12	Retirement Housing Foundation	CA	50	1
44	171	Redstone Presbyterian SeniorCare	PA	50	1
45	73	Eventide	MN	46	1
46	10	Benedictine fka Benedictine Health System	MN	40	1
47	25	Springpoint Senior Living Inc.	NJ	40	1
48	61	Lutheran Services Carolinas	NC	33	1
49	92	United Church Homes and Services	NC	32	1

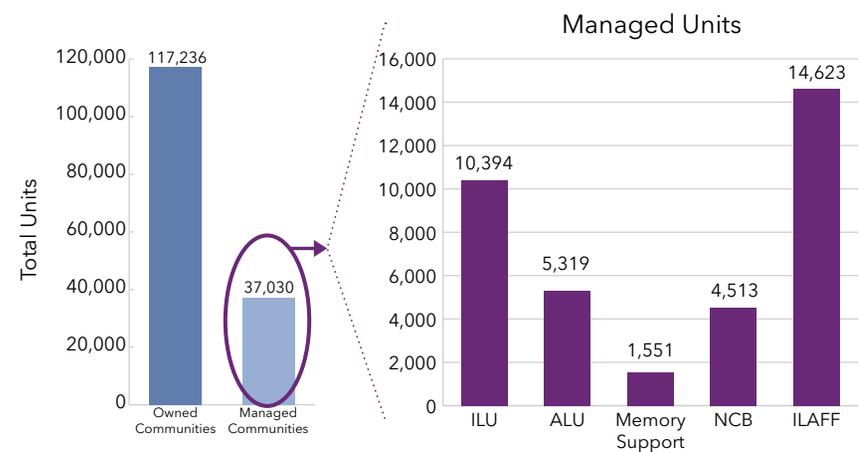
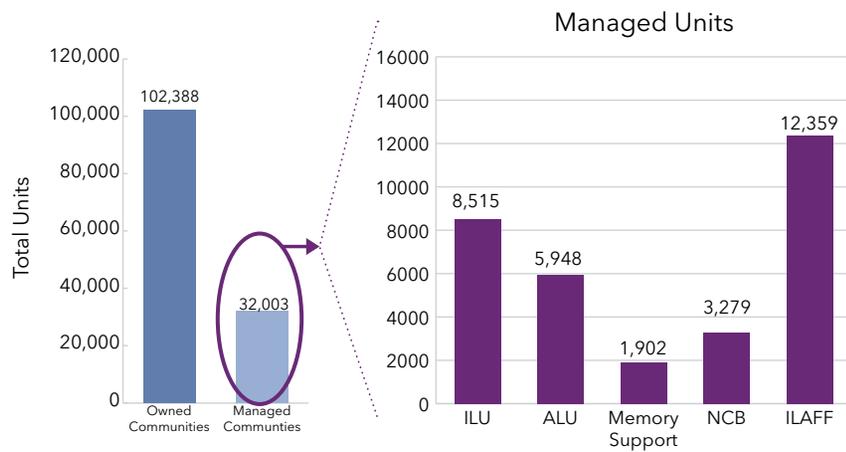
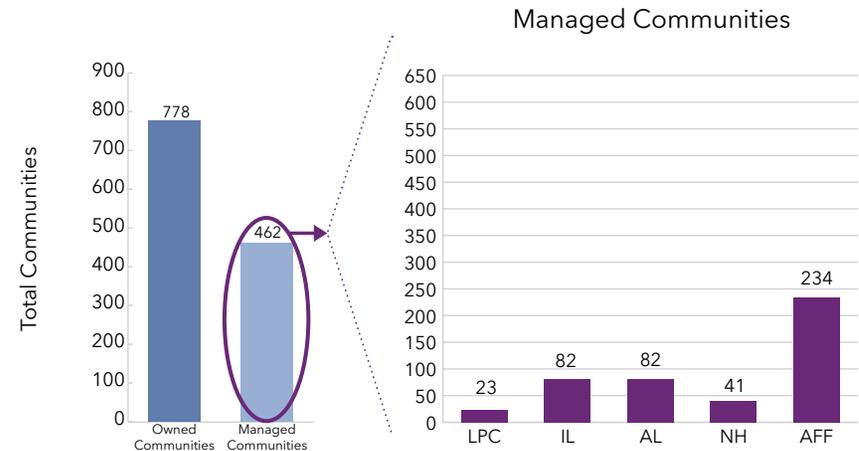
Organizational Characteristics: Managed Units & Communities

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

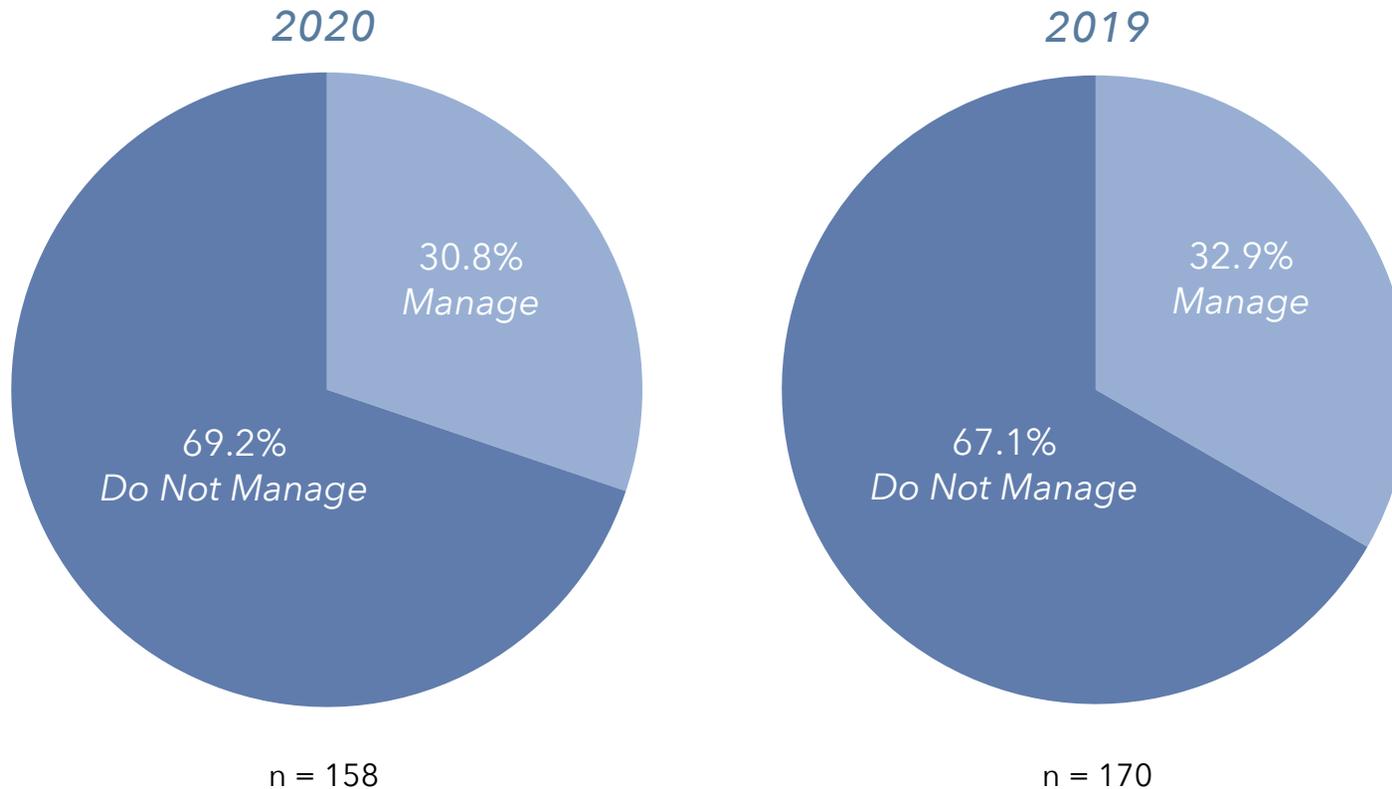
2020



2019



Organizational Characteristics: Managed Units & Communities *Percentage that Manage 2019 Versus 2020*



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. More than 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

2020 Combined MR & MGD Rank	2020 LZ 200 Rank	System Name	State	Units (as of 12/31/19)				
				Total	ILU	ALU	NCB	MGD
1	1	National Senior Campuses	MD	20,917	18,136	1,628	1,153	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	17,665	4,795	2,110	8,602	2,158
3	3	ACTS Retirement Services, Inc.	PA	9,592	6,737	1,118	1,737	0
4	158	Ebenezer Society	MN	8,558	0	320	247	7,991
5	4	Ascension Living	MO	8,129	2,124	1,203	4,802	0
6	5	Presbyterian Homes and Services	MN	8,038	4,118	2,389	1,451	80
7	7	HumanGood	CA	7,509	3,351	1,093	1,030	2,035
8	6	Trinity Health Senior Communities	MI	6,059	1,839	1,199	2,677	344
9	8	Covenant Living Communities & Services	IL	5,228	3,363	884	981	0
10	9	Lifespace Communities Inc.	IA	5,179	3,663	535	981	0
11	44	National Church Residences	OH	5,046	861	521	225	3,439
12	13	Cassia	MN	4,558	522	1,512	1,886	638
13	21	Front Porch Communities and Services	CA	4,502	2,159	183	518	1,642
14	10	Benedictine fka Benedictine Health System	MN	4,434	726	1,496	2,172	40
15	11	Westminster Communities of Florida	FL	4,155	2,852	522	781	0
16	12	Retirement Housing Foundation	CA	4,148	2,646	841	611	50
17	17	Lutheran Senior Services	MO	3,815	1,678	744	1,119	274
18	32	Ecumen	MN	3,813	376	1,391	342	1,704
19	20	Pacific Retirement Services, Inc.	OR	3,785	2,310	378	385	712
20	14	The Kendal Corporation	PA	3,629	2,512	609	508	0
21	19	The Carmelite System, Inc.	NY	3,624	144	421	2,592	467
22	15	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	0
23	16	Asbury Communities, Inc.	MD	3,591	2,147	535	909	0
24	50	Eskaton	CA	3,457	393	688	426	1,950
25	18	Ohio Living	OH	3,286	1,732	567	987	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

2020 Combined MR & MGD Rank	2020 LZ 200 Rank	System Name	State	Units (as of 12/31/19)				
				Total	ILU	ALU	NCB	MGD
26	24	Masonic Villages of the Grand Lodge of Pennsylvania	PA	3,020	1,614	259	684	463
27	51	United Church Homes, Inc.	OH	2,967	448	273	770	1,476
28	22	Concordia Lutheran Ministries	PA	2,806	996	1,147	663	0
29	23	Otterbein SeniorLife	OH	2,630	1,123	496	1,011	0
30	25	Springpoint Senior Living Inc.	NJ	2,588	1,740	317	491	40
31	26	Volunteers of America	VA	2,484	604	873	1,007	0
32	27	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	0
33	28	Christian Care Companies	AZ	2,399	1,911	420	68	0
34	46	Presbyterian SeniorCare Network	PA	2,320	396	520	675	729
35	96	Christian Living Communities	CO	2,277	464	261	196	1,356
36	29	Presbyterian Manors of Mid-America, Inc.	KS	2,247	908	563	776	0
37	30	Shell Point Retirement Community	FL	2,204	1,406	449	349	0
38	62	Presbyterian Village of Michigan	MI	2,198	904	264	102	928
39	31	Christian Horizons	MO	2,181	383	312	1,486	0
40	65	American Baptist Homes of the Midwest	MN	2,069	384	253	608	824
41	33	Willow Valley Communities	PA	2,044	1,547	214	283	0
42	40	Franciscan Communities, Inc.	IL	1,943	742	345	613	243
43	34	Homewood Retirement Centers Inc.	MD	1,873	1,134	288	451	0
44	35	Transforming Age	WA	1,848	1,097	751	0	0
45	36	WesleyLife	IA	1,843	808	375	660	0
46	37	Greencroft Communities	IN	1,842	646	586	610	0
47	38	ArchCare	NY	1,782	0	59	1,723	0
48	39	Bethesda Senior Living Communities	CO	1,762	111	1,651	0	0
49	49	BHI Senior Living Inc	IN	1,716	472	693	352	199
50	58	Masonicare	CT	1,701	651	309	366	375

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

2020 Combined MR & MGD Rank	2020 LZ 200 Rank	System Name	State	Units (as of 12/31/19)				
				Total	ILU	ALU	NCB	MGD
51	41	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	0
52	42	Loretto	NY	1,684	210	551	923	0
53	53	Bethesda Health Group, Inc	MO	1,642	727	78	655	182
54	43	Covenant Health	MA	1,636	0	364	1,272	0
55	45	Hebrew SeniorLife	MA	1,592	659	119	814	0
56	81	The Presbyterian Homes, Inc.	NC	1,589	706	133	189	561
57	47	Lutheran Life Communities	IL	1,551	408	360	783	0
58	48	Baptist Village Communities	OK	1,521	939	257	325	0
59	55	Providence Life Services	IL	1,507	767	372	282	86
60	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	0
61	57	Covia Communities	CA	1,459	954	100	298	107
62	54	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	0
63	56	Presbyterian Homes	IL	1,420	842	237	341	0
64	79	Walker Methodist	MN	1,408	0	748	327	333
65	71	Western Home Services	IA	1,380	587	314	283	196
66	61	Lutheran Services Carolinas	NC	1,335	311	259	732	33
67	59	Methodist Retirement Communities	TX	1,316	629	393	294	0
68	60	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	0
69	63	LifeSpire of Virginia	VA	1,269	757	285	227	0
70	64	Heritage Ministries	NY	1,268	363	221	684	0
71	66	Immanuel	NE	1,240	646	393	201	0
72	102	St. Andrew's Resources for Seniors System	MO	1,238	379	208	290	361
73	67	Wesley Enhanced Living	PA	1,235	629	246	360	0
74	68	UMRC and Porter Hills	MI	1,199	678	335	186	0
75	69	Holland Home	MI	1,196	749	288	159	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

2020 Combined MR & MGD Rank	2020 LZ 200 Rank	System Name	State	Units (as of 12/31/19)				
				Total	ILU	ALU	NCB	MGD
76	70	SpiriTrust Lutheran	PA	1,193	557	292	344	0
77	73	Eventide	MN	1,188	71	469	602	46
78	72	Phoebe Ministries	PA	1,163	370	259	534	0
79	74	Ingleside	MD	1,128	832	157	139	0
80	75	Friendship Senior Options	IL	1,127	701	184	242	0
81	76	Lutheran SeniorLife	PA	1,123	489	192	442	0
82	77	Pinnacle Living	VA	1,121	514	393	214	0
83	78	United Methodist Homes	NY	1,088	389	273	426	0
84	80	Lutheran Homes of SC	SC	1,060	404	306	350	0
85	89	Baruch fka Baruch Senior Ministries	MI	1,023	2	955	0	66
86	105	Goodwin House Incorporated	VA	1,011	580	121	149	161
87	82	Saint Therese	MN	1,010	475	125	410	0
88	83	Blue Skies of Texas	TX	1,001	728	129	144	0
89	84	Presbyterian Communities of South Carolina	SC	1,001	411	316	274	0
90	145	Wellspring Lutheran Services	MI	995	125	169	341	360
91	85	Felician Services, Inc.	IL	990	177	268	545	0
92	86	Friendship Villages of St. Louis	MO	987	691	88	208	0
93	92	United Church Homes and Services	NC	985	535	90	328	32
94	87	The United Methodist Retirement Homes, Inc.	NC	984	674	108	202	0
95	88	Liberty Lutheran Services	PA	972	437	318	217	0
96	90	Haverland Carter Lifestyle Group	NM	954	414	442	98	0
97	91	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	0
98	125	Samaritas	MI	951	294	120	348	189
99	93	Sequoia Living, Inc	CA	946	702	103	141	0
100	122	Lutheran Social Ministries of New Jersey, Inc.	NJ	939	277	182	310	170

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

2020 Combined MR & MGD Rank	2020 LZ 200 Rank	System Name	State	Units (as of 12/31/19)				
				Total	ILU	ALU	NCB	MGD
101	94	Wesley	WA	930	592	154	184	0
102	95	Christian Care Communities	KY	930	365	160	405	0
103	97	St. John's	NY	916	403	38	475	0
104	98	St. Ann's of Greater Rochester, Inc.	NY	914	297	75	542	0
105	99	Givens Communities	NC	895	674	91	130	0
106	100	Masonic Homes of Kentucky	KY	888	450	151	287	0
107	101	United Methodist Communities	NJ	878	88	542	248	0
108	103	Sun Health Services fka Sun Health Senior Living LLC	AZ	866	637	114	115	0
109	104	Menno Haven, Inc.	PA	858	434	178	246	0
110	106	Living Branches	PA	839	459	237	143	0
111	107	The New Jewish Home	NY	838	24	0	814	0
112	108	The RiverWoods Group	NH	834	623	124	87	0
113	109	Lutheran Social Ministries of Maryland	MD	823	639	69	115	0
114	110	Landis Communities	PA	811	548	160	103	0
115	111	Life Enriching Communities	OH	811	532	135	144	0
116	112	LutherCare	PA	810	473	126	211	0
117	113	Messiah Lifeways	PA	807	440	183	184	0
118	114	Simpson Senior Servies	PA	802	454	170	178	0
119	115	Mather fka Mather LifeWays	IL	801	665	59	77	0
120	116	Wesley Willows	IL	799	539	169	91	0
121	117	National Lutheran Communities & Services	MD	795	435	180	180	0
122	118	The Ohio Masonic Home	OH	787	377	246	164	0
123	119	Sunnyside Presbyterian Home	VA	786	495	157	134	0
124	159	Episcopal Communities & Services	CA	778	436	82	48	212
125	120	Garden Spot Communities	PA	774	569	86	119	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

2020 Combined MR & MGD Rank	2020 LZ 200 Rank	System Name	State	Units (as of 12/31/19)				
				Total	ILU	ALU	NCB	MGD
126	121	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	0
127	123	Grace Inspired Ministries	PA	767	451	151	165	0
128	124	United Church of Christ Homes	PA	766	267	124	375	0
129	142	Baptist Homes Society	PA	762	326	138	189	109
130	126	Christian Care Centers	TX	757	409	229	119	0
131	152	St. John's Lutheran Ministries, Inc.	MT	748	145	257	186	160
132	127	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	0
133	128	Benevolent Corporation Cedar Community	WI	746	409	227	110	0
134	129	Vista Prairie Communities	MN	736	100	636	0	0
135	130	Moorings Park	FL	731	511	114	106	0
136	131	Emerald Communities	WA	725	527	107	91	0
137	143	Episcopal SeniorLife Communities	NY	716	334	131	182	69
138	132	Morningside Ministries	TX	707	343	154	210	0
139	133	Christian Health Care Center	NJ	707	329	80	298	0
140	134	United Methodist Memorial Home	IN	699	188	255	256	0
141	135	Maple Knoll Communities, Inc.	OH	686	388	91	207	0
142	136	The Wesley Communities fka Methodist ElderCare Services	OH	678	338	234	106	0
143	137	Sunset Senior Communities fka Sunset Retirement Communities & Services	MI	677	304	263	110	0
144	138	Vincentian Collaborative Services	PA	675	66	82	527	0
145	139	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	0
146	140	Smith Senior Living	IL	658	322	144	192	0
147	141	Elder Care Alliance	CA	658	135	464	59	0
148	154	Episcopal Retirement Services	OH	642	267	115	194	66
149	144	Community Wellness Partners, Inc.	NY	640	124	0	516	0
150	146	Luther Manor	WI	633	325	156	152	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

2020 Combined MR & MGD Rank	2020 LZ 200 Rank	System Name	State	Units (as of 12/31/19)				
				Total	ILU	ALU	NCB	MGD
151	175	Bethany St. Joseph Corporation	WI	632	135	158	204	135
152	177	Knute Nelson	MN	627	211	180	93	143
153	147	CRISTA Senior Living	WA	624	374	141	109	0
154	148	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	0
155	187	Council for Jewish Elderly	IL	606	36	165	240	165
156	149	Baptist Retirement Homes of North Carolina Incorporated	NC	601	262	138	201	0
157	150	Deaconess Abundant Life Communities	MA	598	377	138	83	0
158	151	Genacross Lutheran Services	OH	598	138	175	285	0
159	153	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	0
160	155	Friends Homes, Inc.	NC	568	359	100	109	0
161	156	Sholom	MN	568	154	142	272	0
162	157	Havenwood Heritage Heights	NH	567	367	63	137	0
163	171	Redstone Presbyterian SeniorCare	PA	566	305	134	77	50
164	160	Bethel	NY	563	170	130	263	0
165	161	Christian Village Communities	OH	559	221	190	148	0
166	162	Friendly Senior Living	NY	554	298	56	200	0
167	163	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	0
168	164	Church Homes, Inc.	CT	542	319	24	199	0
169	165	Cardinal Ritter Senior Services	MO	541	205	90	246	0
170	166	Medford Leas	NJ	535	392	119	24	0
171	167	EHM Senior Solutions	MI	529	112	70	347	0
172	168	Rockwood Retirement Communities	WA	528	368	95	65	0
173	169	The Lutheran Home Association	WI	525	161	157	207	0
174	170	Lutheran Life Villages	IN	524	135	65	324	0
175	172	United Methodist Homes	CT	507	90	297	120	0

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

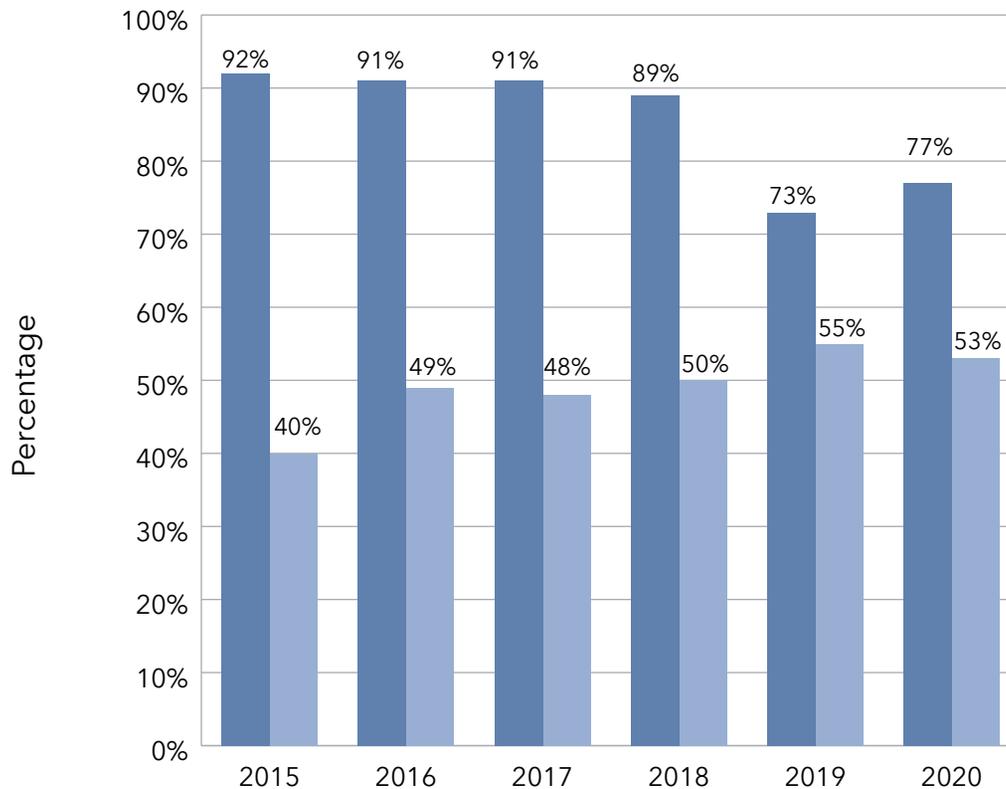
Organizational Characteristics: Managed Units & Communities (Continued)

Providers that Manage, Ranked by Market Rate & Managed Units

2020 Combined MR & MGD Rank	2020 LZ 200 Rank	System Name	State	Units (as of 12/31/19)				
				Total	ILU	ALU	NCB	MGD
176	173	Presbyterian Homes of Georgia	GA	501	117	89	295	0
177	174	Judson Services, Inc.	OH	500	227	135	138	0
178	176	The Eliza Jennings Senior Care Network	OH	486	175	89	222	0
179	178	St. Paul's Episcopal Home, Inc.	CA	481	135	287	59	0
180	179	United Methodist Services for the Aging	PA	480	173	168	139	0
181	180	Avinity fka Avinity Senior Living	MN	477	363	114	0	0
182	181	Wesley Woods Senior Living	GA	477	361	93	23	0
183	182	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	0
184	183	The Loomis Communities	MA	459	359	58	42	0
185	184	Allegheny Lutheran Social Ministries	PA	451	203	96	152	0
186	185	Beechwood Health Care Center, Inc.	NY	447	110	65	272	0
187	186	Michigan Masonic Homes	MI	442	38	155	249	0
188	188	Willow Brook Christian Communities	OH	437	230	123	84	0
189	189	Baptist Life Communities	KY	428	150	60	218	0
190	190	Parker Health Group, Inc.	NJ	427	0	80	347	0
191	191	Skaalen Retirement Services	WI	421	229	101	91	0
192	192	Jewish Senior Life of Metropolitan Detroit	MI	420	290	130	0	0
193	193	A.G. Rhodes Health & Rehab	GA	418	0	0	418	0
194	194	Colonial Senior Services, Inc	OH	411	182	101	128	0
195	195	SCBMA	SC	402	94	134	174	0
196	196	Clark Retirement Community, Inc.	MI	401	194	168	39	0
197	197	Saint Mary's Home of Erie	PA	393	26	148	219	0
198	198	Valley View Retirement Community	PA	390	133	95	162	0
199	199	Good Shepherd Communities	NY	383	194	105	84	0
200	200	Cornerstone Village	TN	378	176	99	103	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



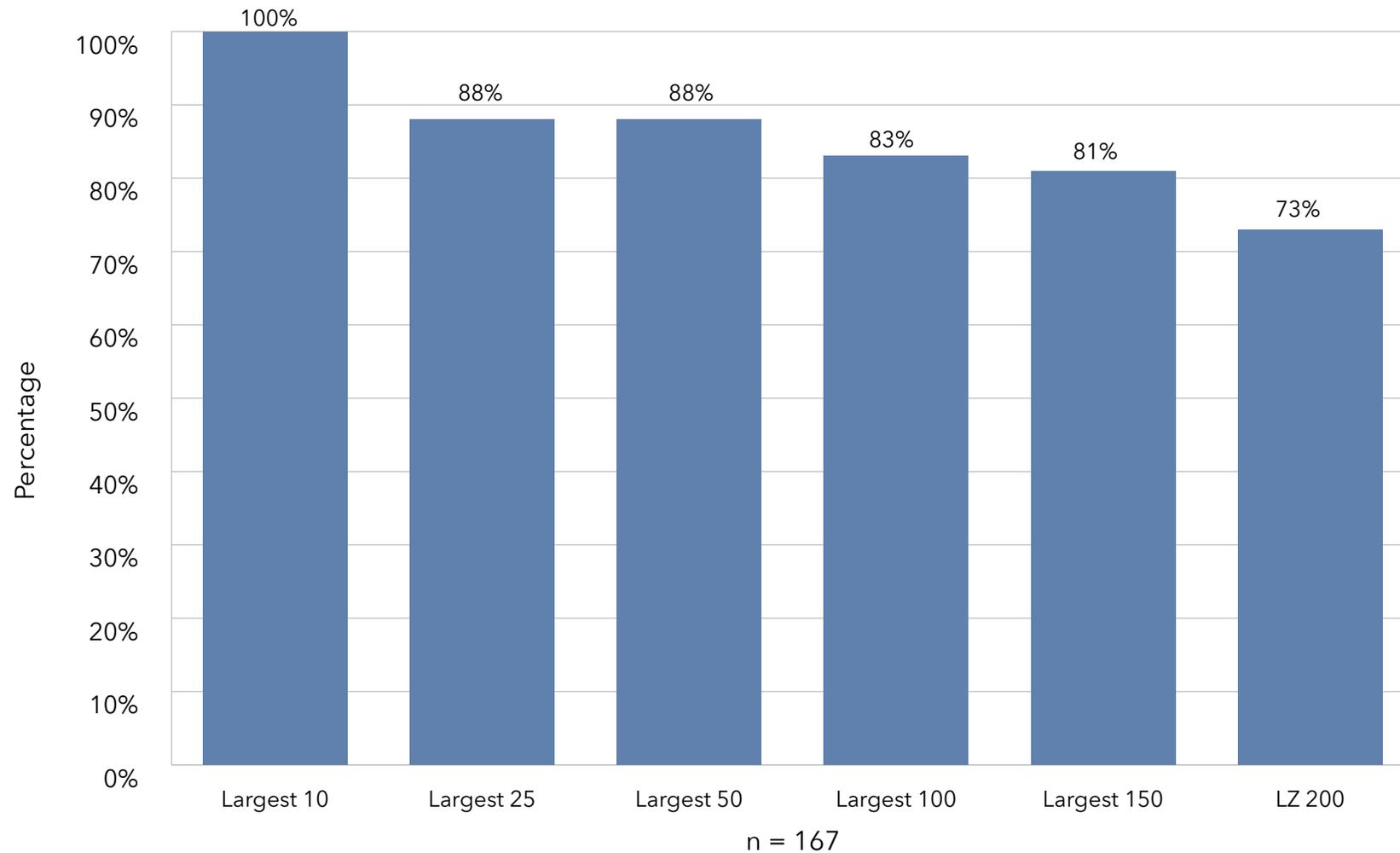
KEY: ■ Percentage Private (AL) ■ Percentage Private (SN)

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 77% being private. On the other hand, 53% of the skilled nursing units are private.

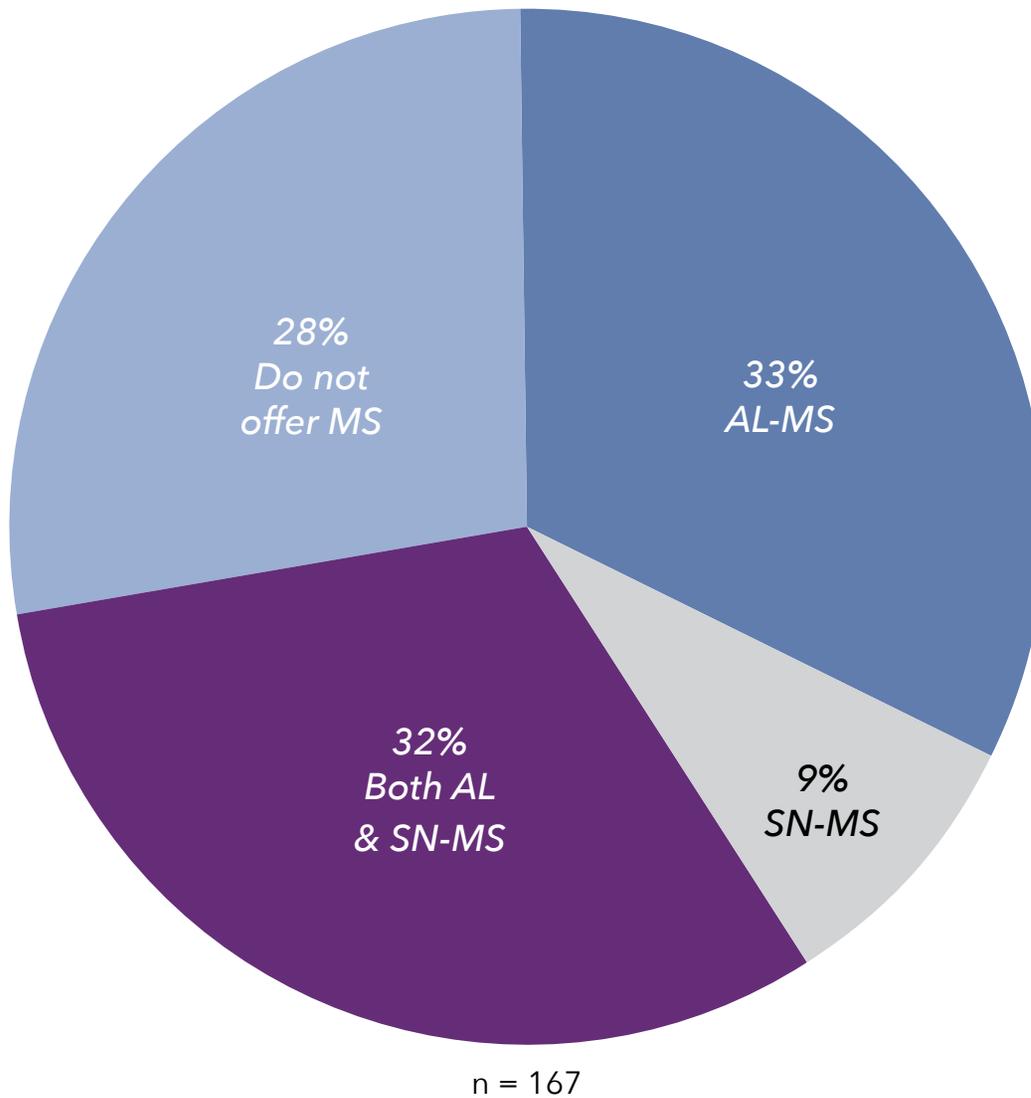
This year's publication is the ninth in which the percentage of LZ 200 organizations that own and operate memory support (MS) units is analyzed. Section 4-17 details the percentage of LZ 200, by the largest 10, 25, 50, 100, 150, and 200, that offer specialized memory support units. Roughly 73% of the organizations offer memory support, with more than 32% offering both assisted living and skilled nursing memory care services. An additional 33% offer only assisted living memory support.

Organizational Characteristics: Assisted and Skilled Composition *Percentage That Offer Memory Support*



KEY: ■ Offer Memory Support

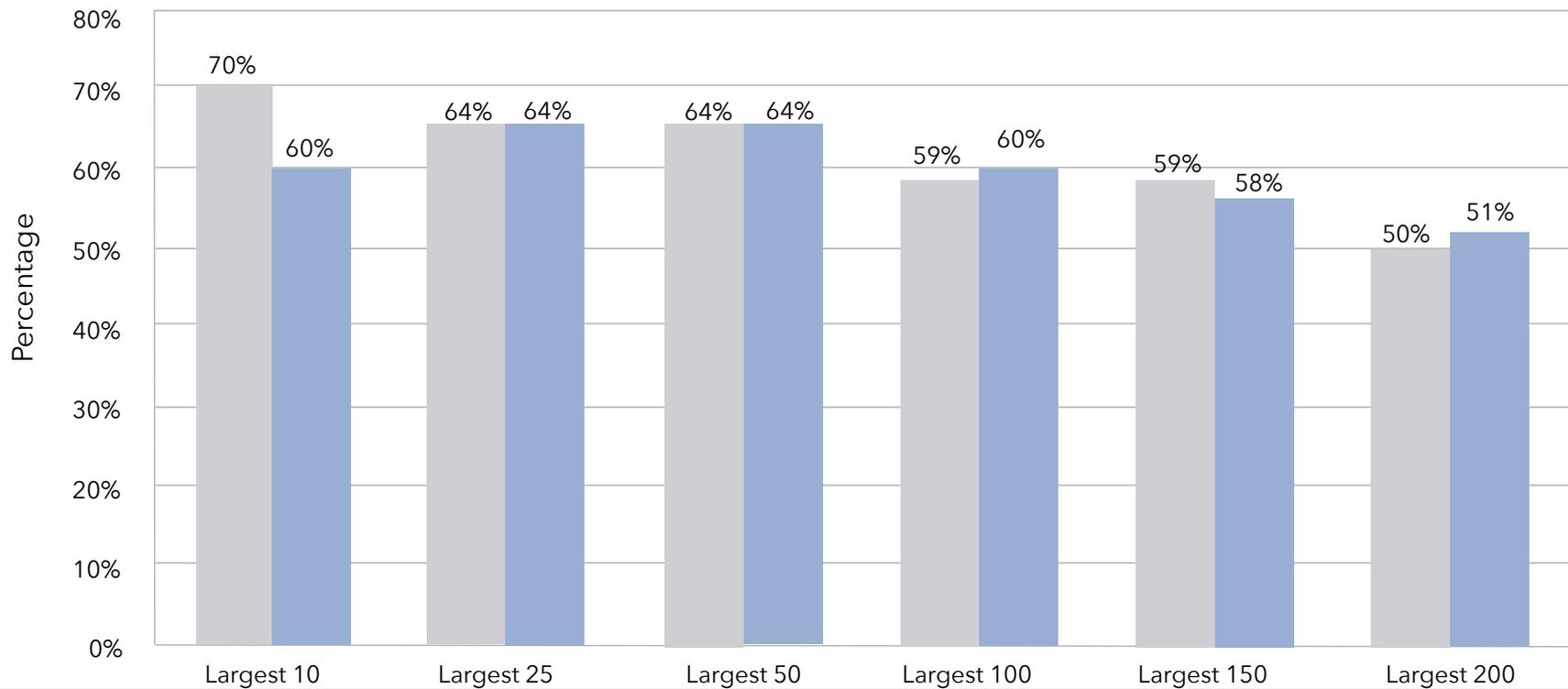
Organizational Characteristics: Assisted and Skilled Composition *Type of Memory Support Offered*



Organizational Characteristics: Home & Community-Based Services Percentage Offering HCBS to Non-Residents

Home and Community-Based Services (HCBS)

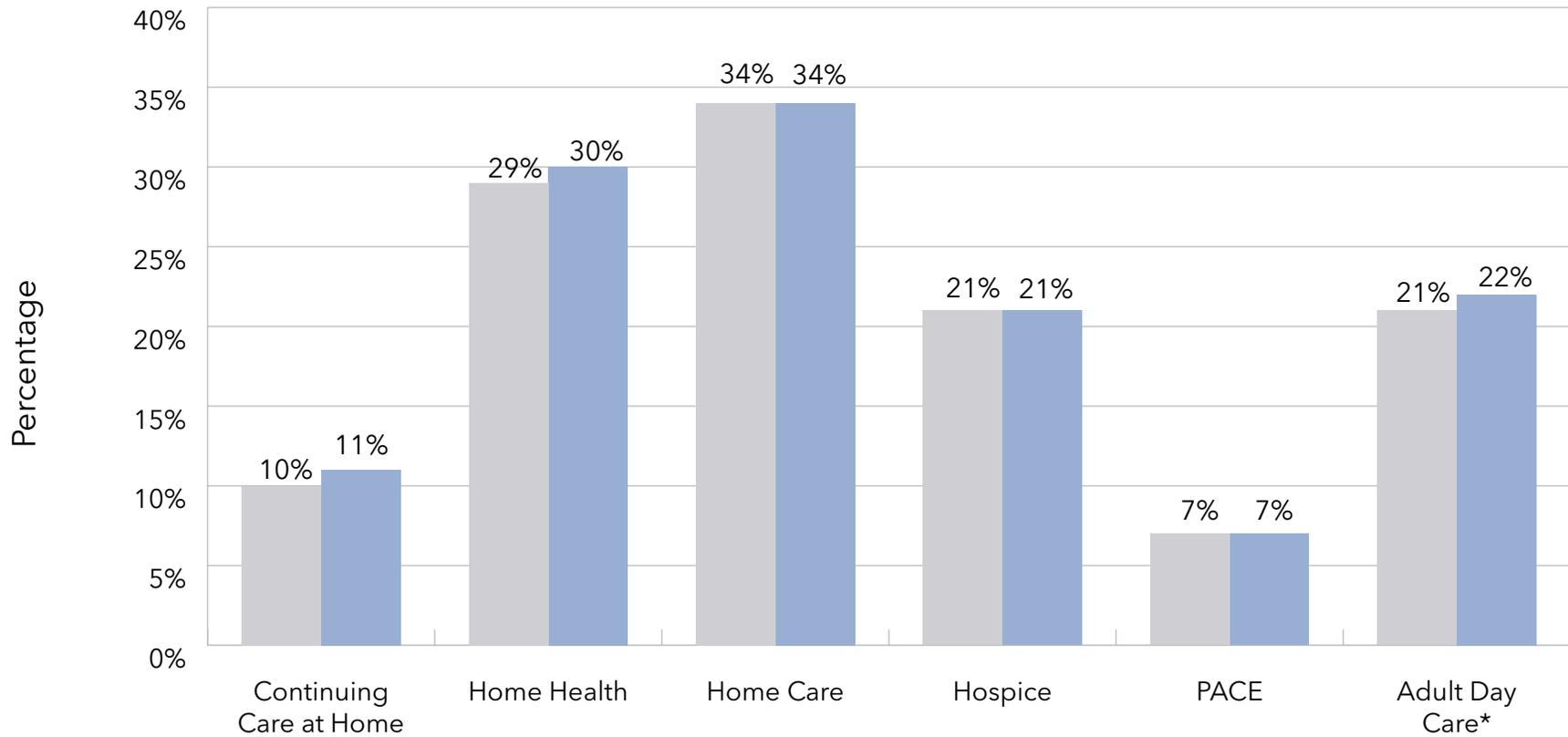
This year's survey gathered overall feedback on the percentage of providers offering home and community-based services, and specifically drilled down into Continuing Care at Home (CCaH), Program of All-Inclusive Care for the Elderly (PACE), and hospice services for individuals in the greater community. Overall, 60% 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 11% of the LZ 200. Approximately seven percent (7%) have PACE programs, and hospice services are being provided by 21%.



KEY: 2019 2020

n = 168

Organizational Characteristics: Home & Community-Based Services Offering: PACE, CCaH, External Hospice & Other Home Care



KEY: 2019 2020

n = 168

Organizational Characteristics: Home & Community-Based Services HCBS Providers with \$10 Million+ in HCBS Revenue

2020 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
1	Trinity Health Senior Communities	MI	>\$50 million
2	The Evangelical Lutheran Good Samaritan Society	SD	>\$50 million
3	Presbyterian Village of Michigan	MI	>\$50 million
4	Ascension Living	MO	>\$50 million
5	Holland Home	MI	>\$50 million
6	Concordia Lutheran Ministries	PA	>\$50 million
7	Bethesda Health Group, Inc	MO	>\$50 million
8	UMRC and Porter Hills	MI	>\$50 million
9	Masonicare	CT	>\$50 million
10	Immanuel	NE	>\$50 million
11	The New Jewish Home	NY	\$25-\$50 million
12	Ohio Living	OH	\$25-\$50 million
13	SpiriTrust Lutheran	PA	\$25-\$50 million
14	Presbyterian Homes and Services	MN	\$25-\$50 million
15	Felician Services, Inc.	IL	\$10-\$24 million
16	United Church Homes and Services	NC	\$10-\$24 million
17	Transforming Age	WA	\$10-\$24 million
18	WesleyLife	IA	\$10-\$24 million
19	Covenant Living Communities & Services	IL	\$10-\$24 million
20	Lutheran SeniorLife	PA	\$10-\$24 million
21	ACTS Retirement Services, Inc.	PA	\$10-\$24 million
22	Knute Nelson	MN	\$10-\$24 million
23	Lutheran Social Ministries of New Jersey, Inc.	NJ	\$10-\$24 million
24	Lutheran Homes of SC	SC	\$10-\$24 million
25	Providence Life Services	IL	\$10-\$24 million

n = 96

Reflects revenues for those who provided their information.

Organizational Characteristics: Home & Community-Based Services HCBS Providers with \$10 Million+ in HCBS Revenue

2020 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
26	Hebrew SeniorLife	MA	\$10-\$24 million
27	Goodwin House Incorporated	VA	\$10-\$24 million
28	Wesley	WA	\$10-\$24 million
29	Sholom	MN	<\$10 million
30	Moorings Park	FL	<\$10 million
31	Liberty Lutheran Services	PA	<\$10 million
32	Lutheran Senior Services	MO	<\$10 million
33	Springpoint Senior Living Inc.	NJ	<\$10 million
34	Masonic Villages of the Grand Lodge of Pennsylvania	PA	<\$10 million
35	Volunteers of America	VA	<\$10 million
36	Covenant Health	MA	<\$10 million
37	Lutheran Life Communities	IL	<\$10 million
38	Saint Therese	MN	<\$10 million
39	Presbyterian SeniorCare Network	PA	<\$10 million
40	Wellspring Lutheran Services	MI	<\$10 million
41	HumanGood	CA	<\$10 million
42	Redstone Presbyterian SeniorCare	PA	<\$10 million
43	Sunnyside Presbyterian Home	VA	<\$10 million
44	Otterbein SeniorLife	OH	<\$10 million
45	Asbury Communities, Inc.	MD	<\$10 million
46	Bethel	NY	<\$10 million
47	Eskaton	CA	<\$10 million
48	Christian Living Communities	CO	<\$10 million
49	The Kendal Corporation	PA	<\$10 million
50	Samaritas	MI	<\$10 million

n = 96

Reflects revenues for those who provided their information.

Organizational Characteristics: Home & Community-Based Services HCBS Providers with \$10 Million+ in HCBS Revenue

2020 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
51	Christian Care Centers	TX	<\$10 million
52	Morningside Ministries	TX	<\$10 million
53	Baptist Village Communities	OK	<\$10 million
54	Parker Health Group, Inc.	NJ	<\$10 million
55	Benedictine fka Benedictine Health System	MN	<\$10 million
56	The United Methodist Retirement Homes, Inc.	NC	<\$10 million
57	Willow Valley Communities	PA	<\$10 million
58	St. John's Lutheran Ministries, Inc.	MT	<\$10 million
59	Western Home Services	IA	<\$10 million
60	St. Andrew's Resources for Seniors System	MO	<\$10 million
61	Benevolent Corporation Cedar Community	WI	<\$10 million
62	Landis Communities	PA	<\$10 million
63	Michigan Masonic Homes	MI	<\$10 million
64	Messiah Lifeways	PA	<\$10 million
65	Methodist Retirement Communities	TX	<\$10 million
66	St. Ann's of Greater Rochester, Inc.	NY	<\$10 million
67	Menno Haven, Inc.	PA	<\$10 million
68	Ecumen	MN	<\$10 million
69	United Methodist Communities	NJ	<\$10 million
70	Allegheny Lutheran Social Ministries	PA	<\$10 million
71	Genacross Lutheran Services	OH	<\$10 million
72	Ingleside	MD	<\$10 million
73	Colonial Senior Services, Inc	OH	<\$10 million
74	Masonic Homes of Kentucky	KY	<\$10 million
75	Lutheran Services Carolinas	NC	<\$10 million

n = 96

Reflects revenues for those who provided their information.

Organizational Characteristics: Home & Community-Based Services HCBS Providers with \$10 Million+ in HCBS Revenue

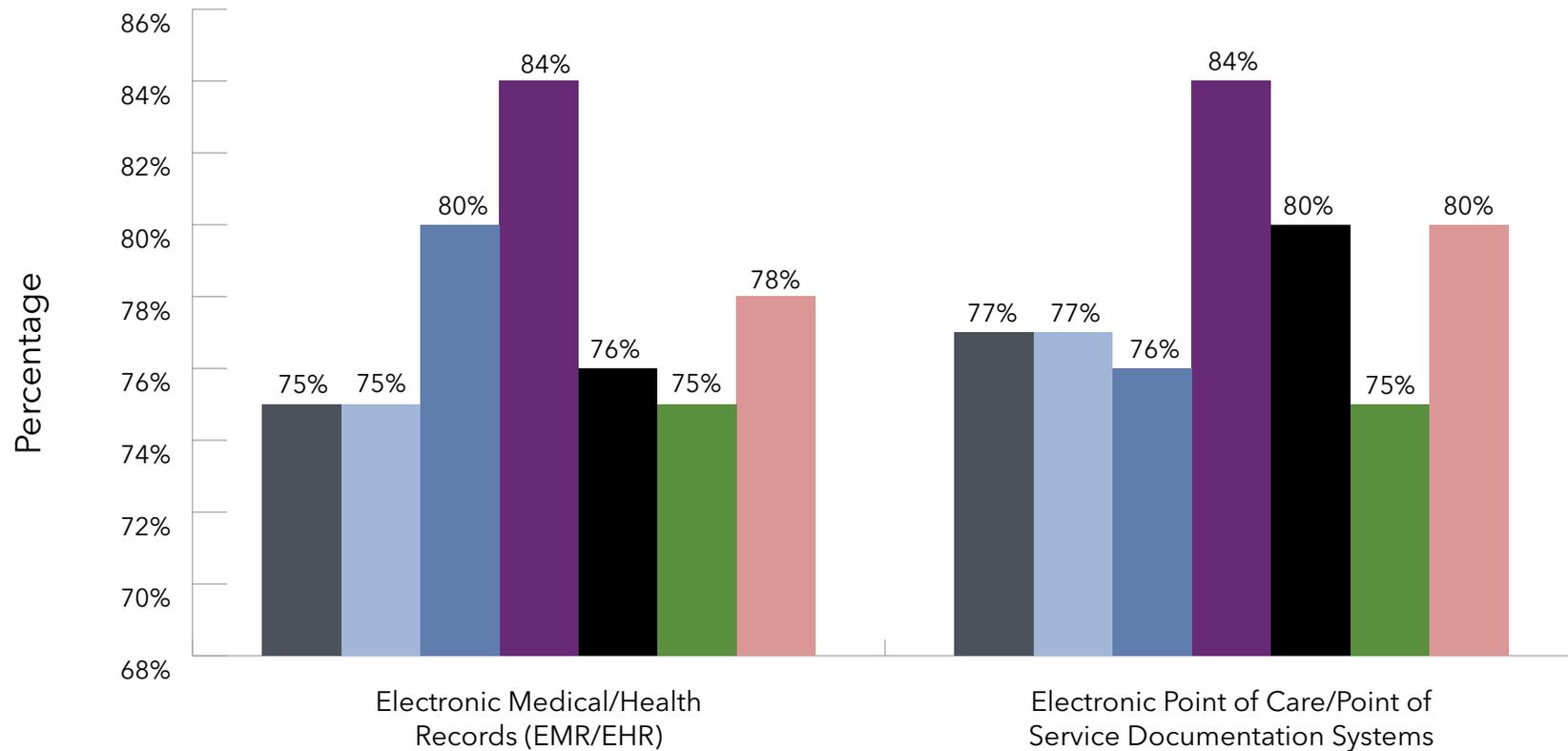
2020 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
76	Sun Health Services fka Sun Health Senior Living LLC	AZ	<\$10 million
77	Franciscan Communities, Inc.	IL	<\$10 million
78	Jewish Senior Life of Metropolitan Detroit	MI	<\$10 million
79	BHI Senior Living Inc	IN	<\$10 million
80	The Loomis Communities	MA	<\$10 million
81	Christian Care Companies	AZ	<\$10 million
82	Greencroft Communities	IN	<\$10 million
83	Christian Care Communities	KY	<\$10 million
84	Baptist Homes Society	PA	<\$10 million
85	Sunset Senior Communities fka Sunset Retirement Communities & Serv.	MI	<\$10 million
86	United Methodist Homes	NY	<\$10 million
87	St. John's	NY	<\$10 million
88	Bethany St. Joseph Corporation	WI	<\$10 million
89	Garden Spot Communities	PA	<\$10 million
90	Simpson Senior Servies	PA	<\$10 million
91	LifeSpire of Virginia	VA	<\$10 million
92	Saint Mary's Home of Erie	PA	<\$10 million
93	United Methodist Memorial Home	IN	<\$10 million
94	Life Enriching Communities	OH	<\$10 million
95	Buckner Retirement Services, Inc.	TX	<\$10 million
96	Episcopal SeniorLife Communities	NY	<\$10 million

n = 96

Reflects revenues for those who provided their information.

Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Electronic Documentation Technologies



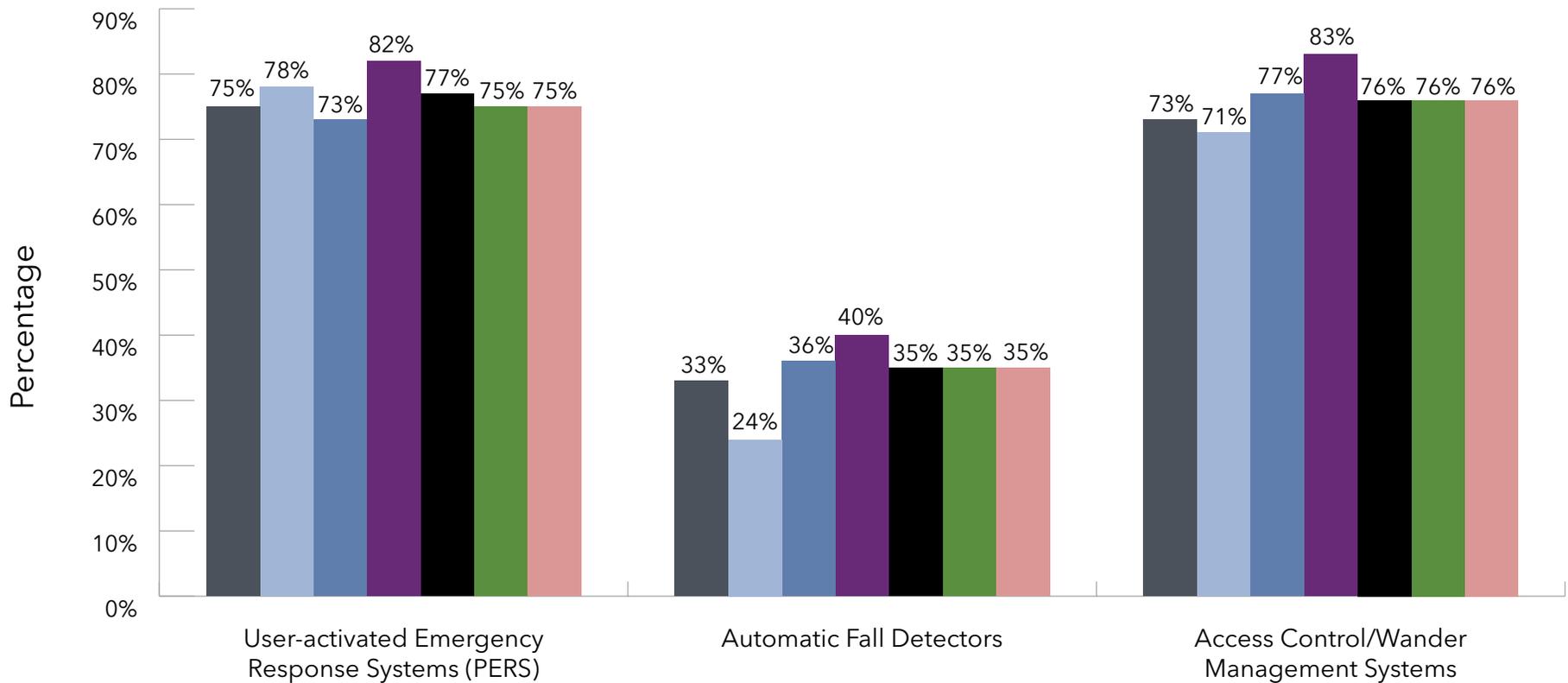
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*Reflects LZ 200 increase with 2018 report
n = 159

Organizational Characteristics: Technology Adoption

Percentage Communities/Operations Using Safety Monitoring Technologies



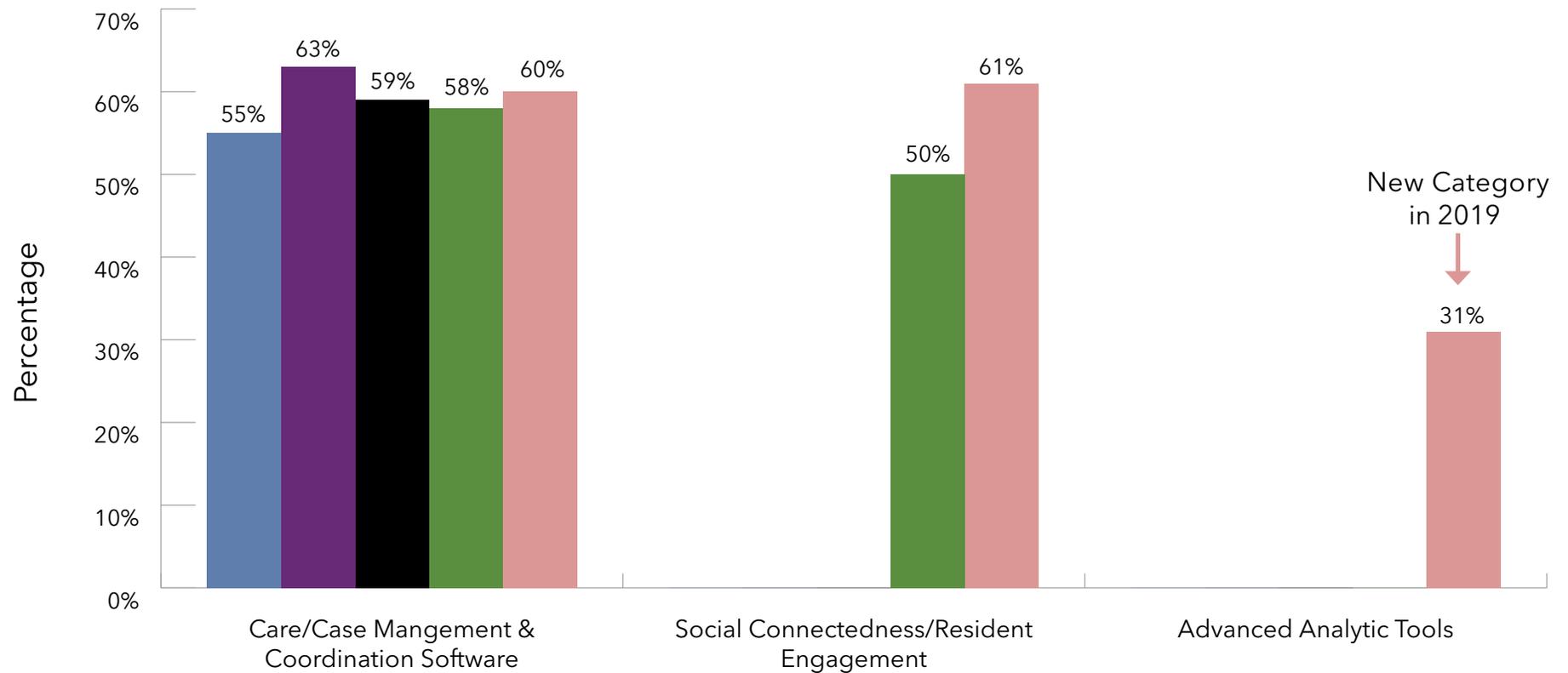
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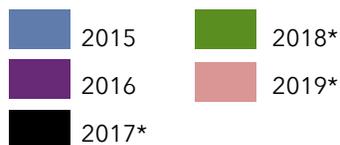
*Reflects LZ 200 increase with 2018 report
n = 159

Organizational Characteristics: Technology Adoption

Percentage of Coordination Software & Resident Engagement Technologies



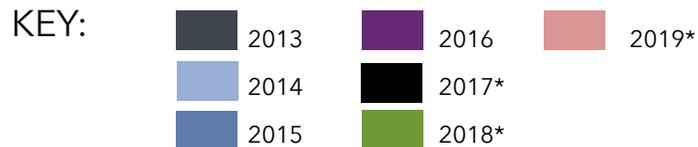
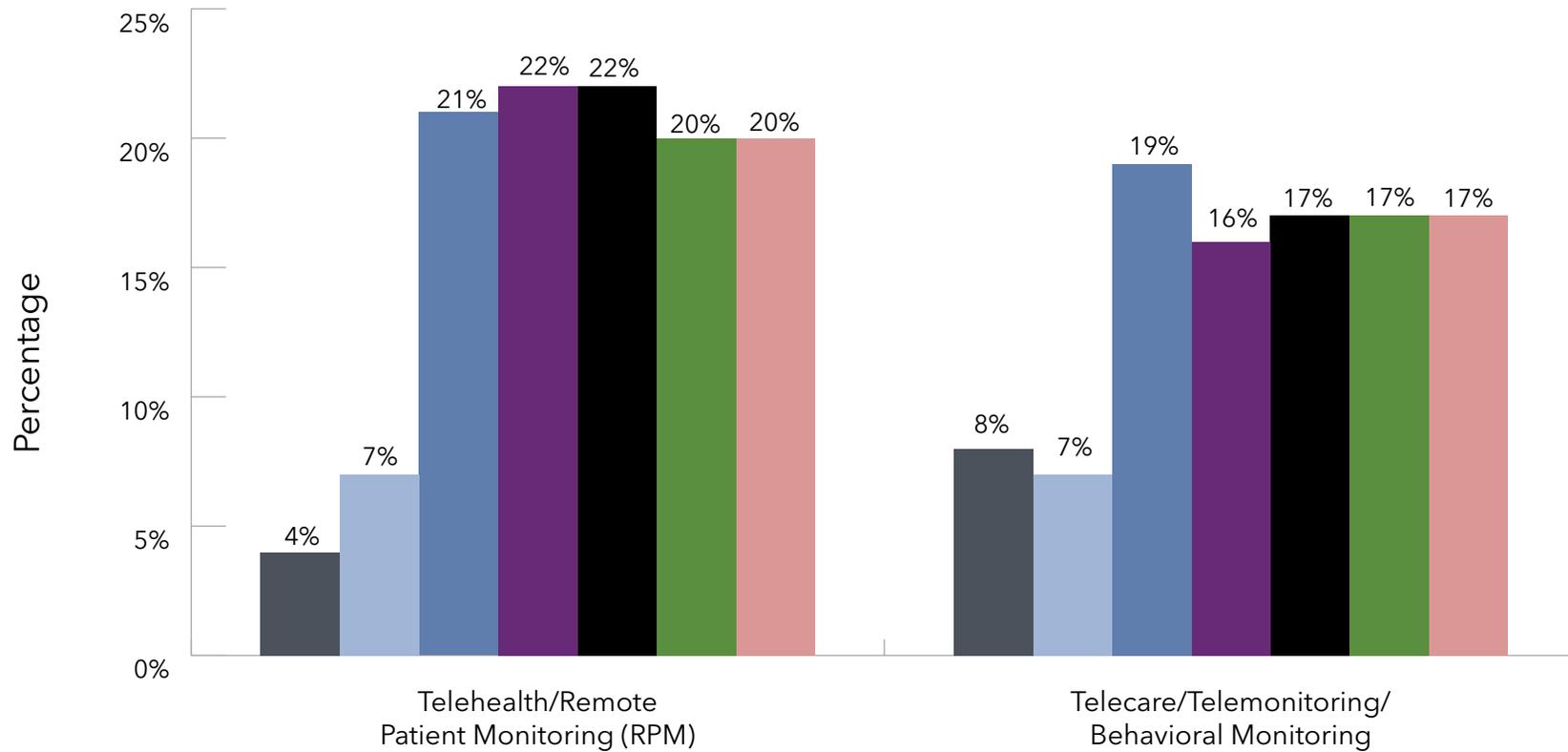
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*Reflects LZ 200 increase with 2018 report
n = 159

Organizational Characteristics: Technology Adoption

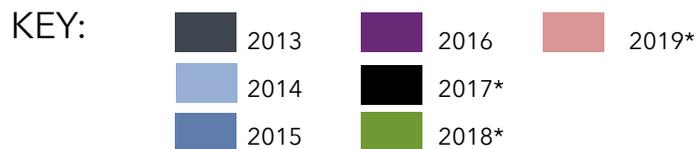
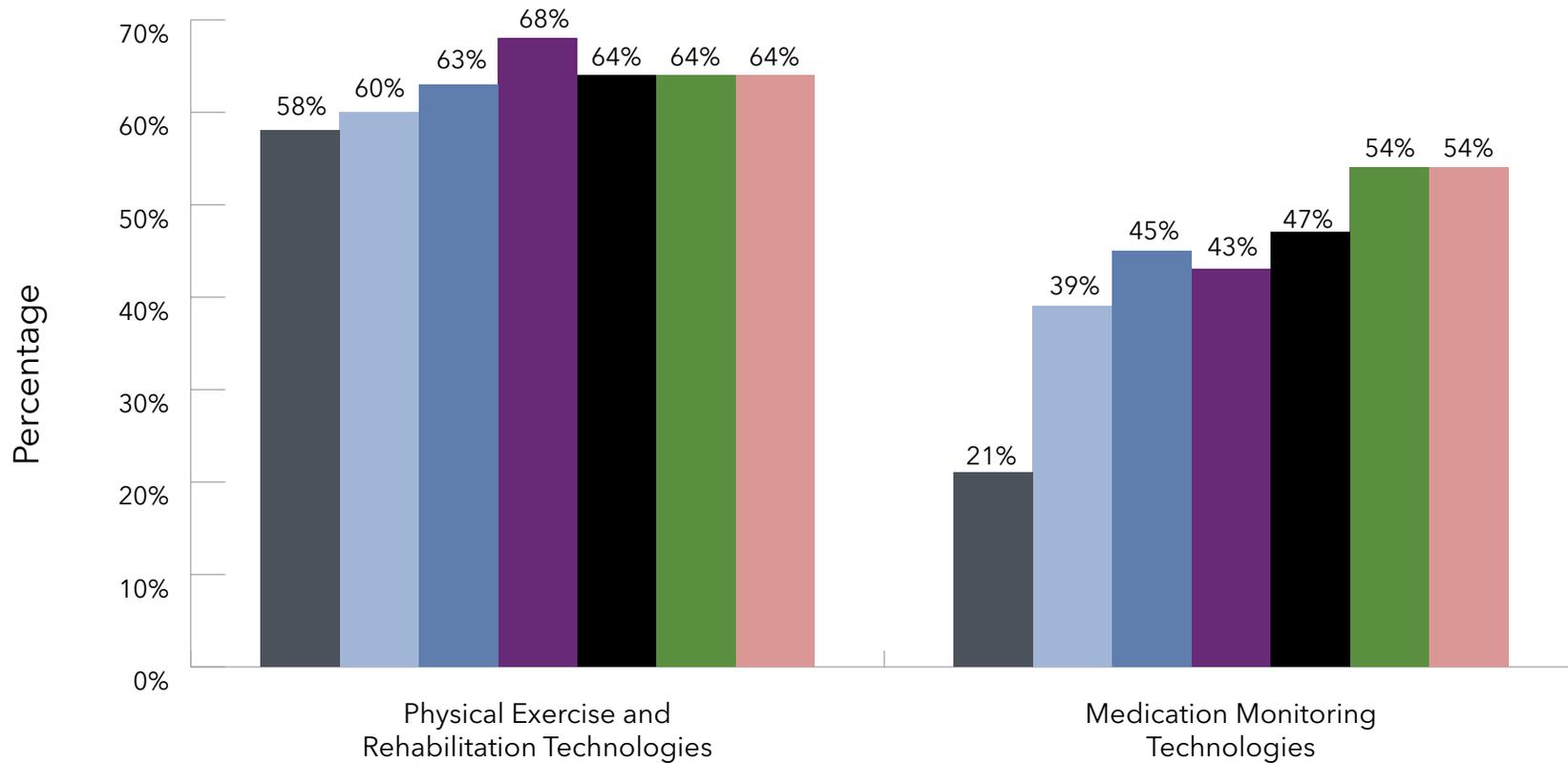
Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies



*Reflects LZ 200 increase with 2018 report
n = 159

Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies



*Reflects LZ 200 increase with 2018 report
n = 159

Organizational Characteristics: Technology Adoption

Type of EMR/EHR Technology

Type of EMR/EHR Technology	
Most Mentions	# of Mentions
PointClickCare	58
Netsmart	40
MatrixCare	42
Eldermark	5
American Data	6
American HealthTech	3
Health MedX	3
ResiDex	3
Other	34

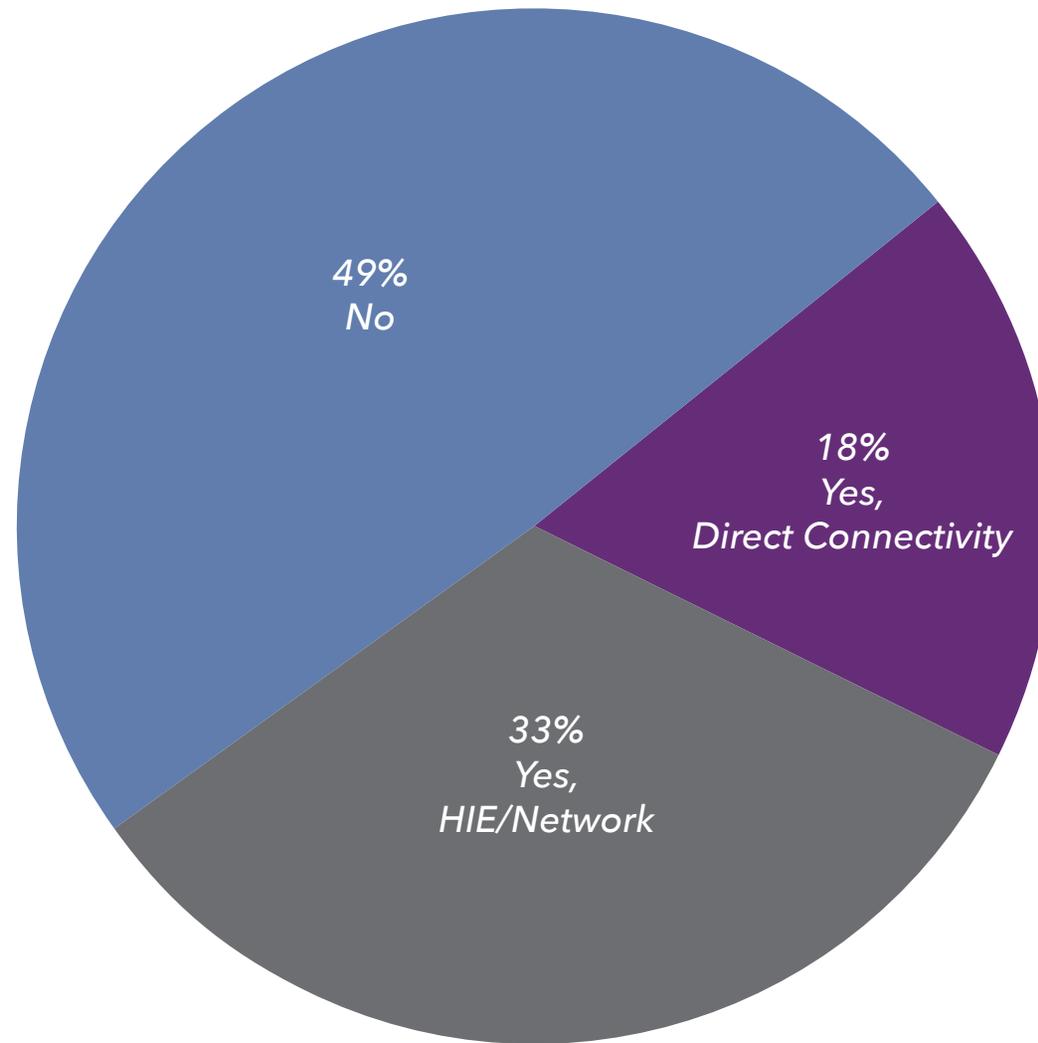
n = 155

155 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, 75% respectively, reported adopting User-Activated Emergency Response Systems and 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*



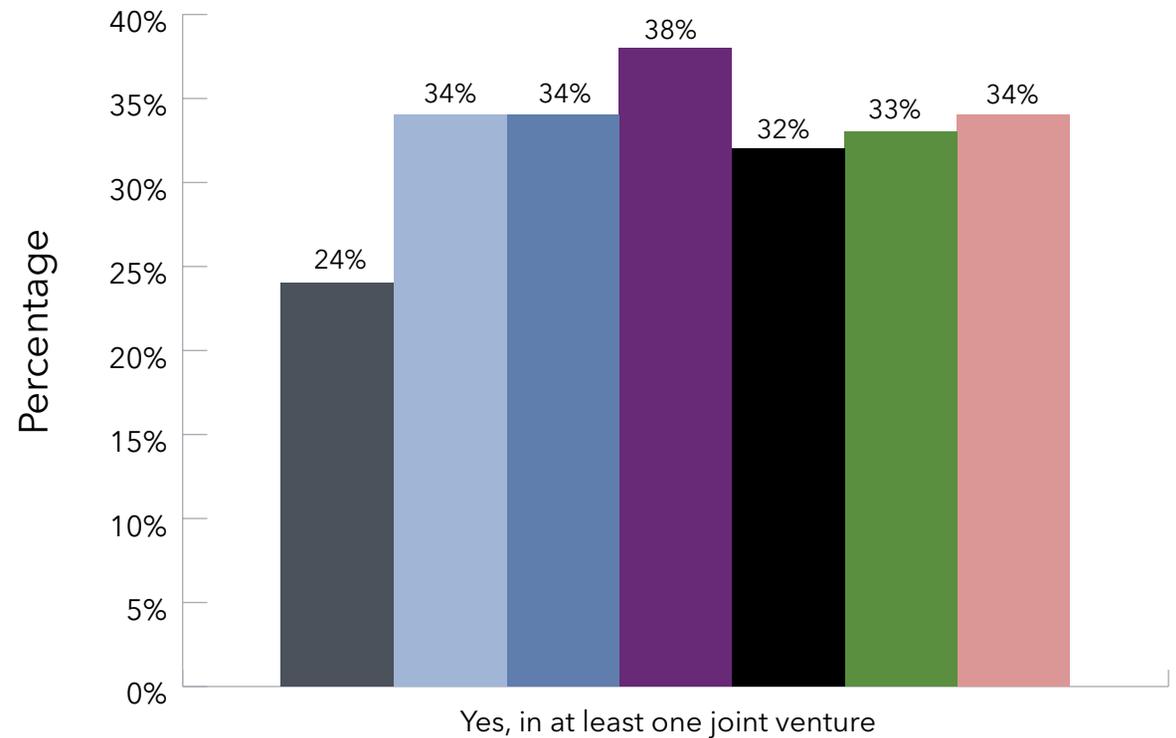
n = 166

Organizational Characteristics: Joint Ventures

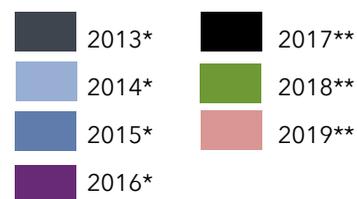
Percentage Engaged in a Joint Venture

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, Accountable Care Organization (ACO), or bundled payment agreements. 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. Forty percent (40%) of the organizations are in a formal ACO or bundled payment contract for formal health care reform.



KEY:



*Reflects increase to LZ 150 with 2014 report

** Reflects LZ 200 with 2018 report

n = 163

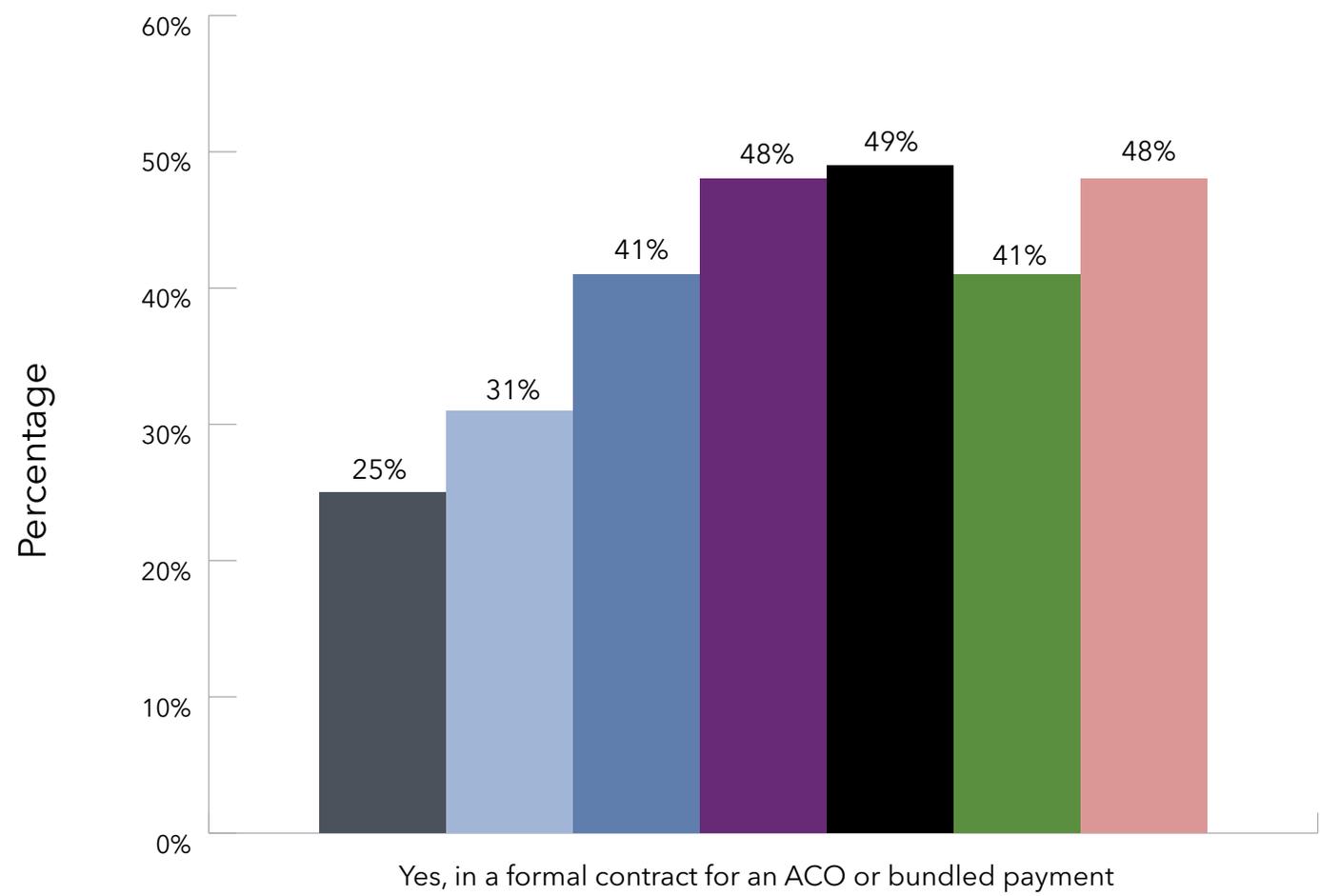
Organizational Characteristics: Joint Ventures

Type of Joint Venture

Type of Joint Venture	
Most Mentions	# of Mentions
Another NFP Senior Living Provider	32
Home Health/Home Care	28
Hospital/Health System	20
HUD/Affordable Housing	18
Rehabilitation/Therapy	16
Hospice	15
Physician's Group	13
PACE	8
Case Management	4

n = 65

Organizational Characteristics: Joint Ventures Organizations in an ACO, Bundled Payment Contract

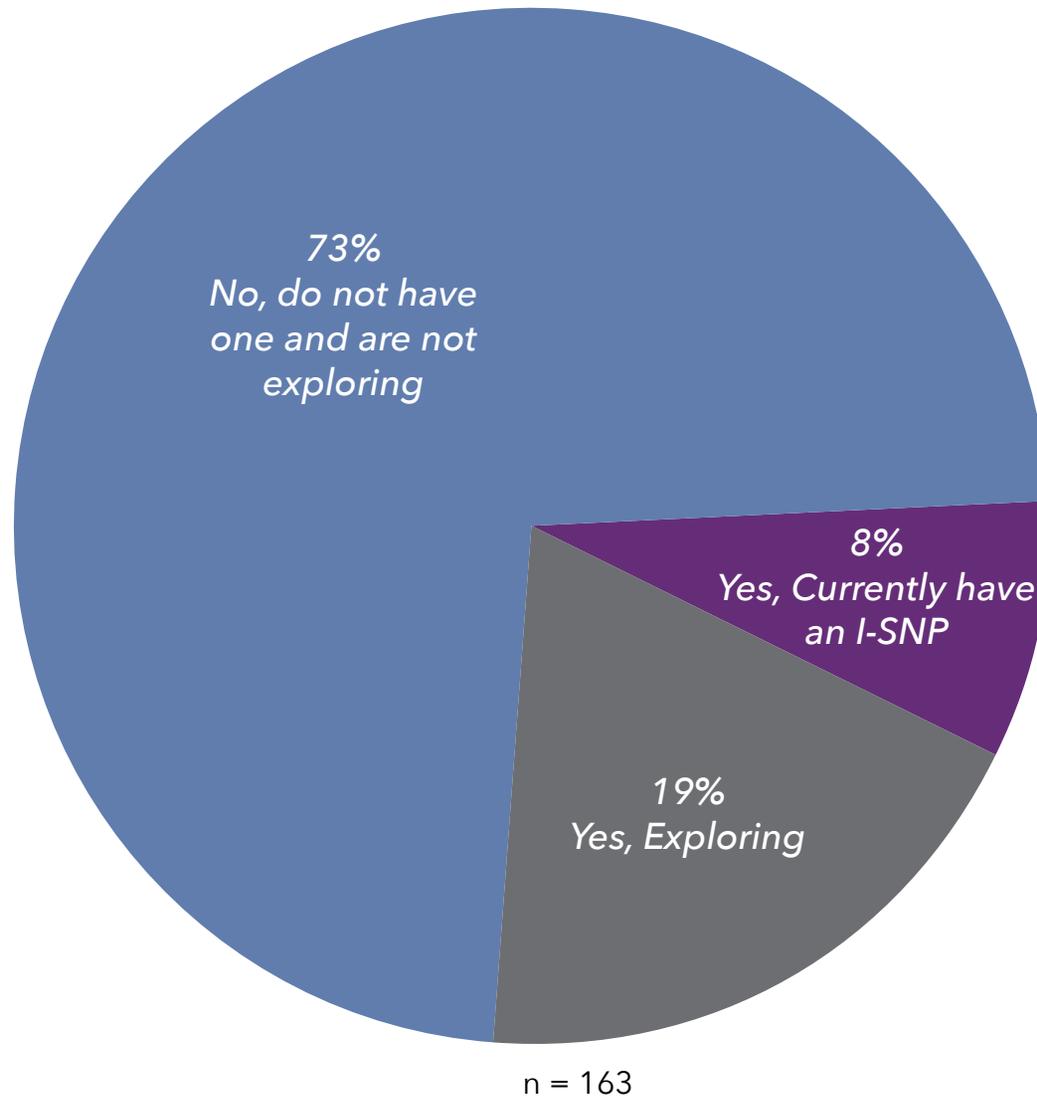


KEY:

- 2013*
- 2014*
- 2015*
- 2016*
- 2017**
- 2018**
- 2019**

*Reflects increase to LZ 150 with 2014 report
** Reflects LZ 200 with 2018 report
n = 163

Organizational Characteristics: Medicare Advantage Plan Organizations Participating in a Medicare Plan



Chapter 5

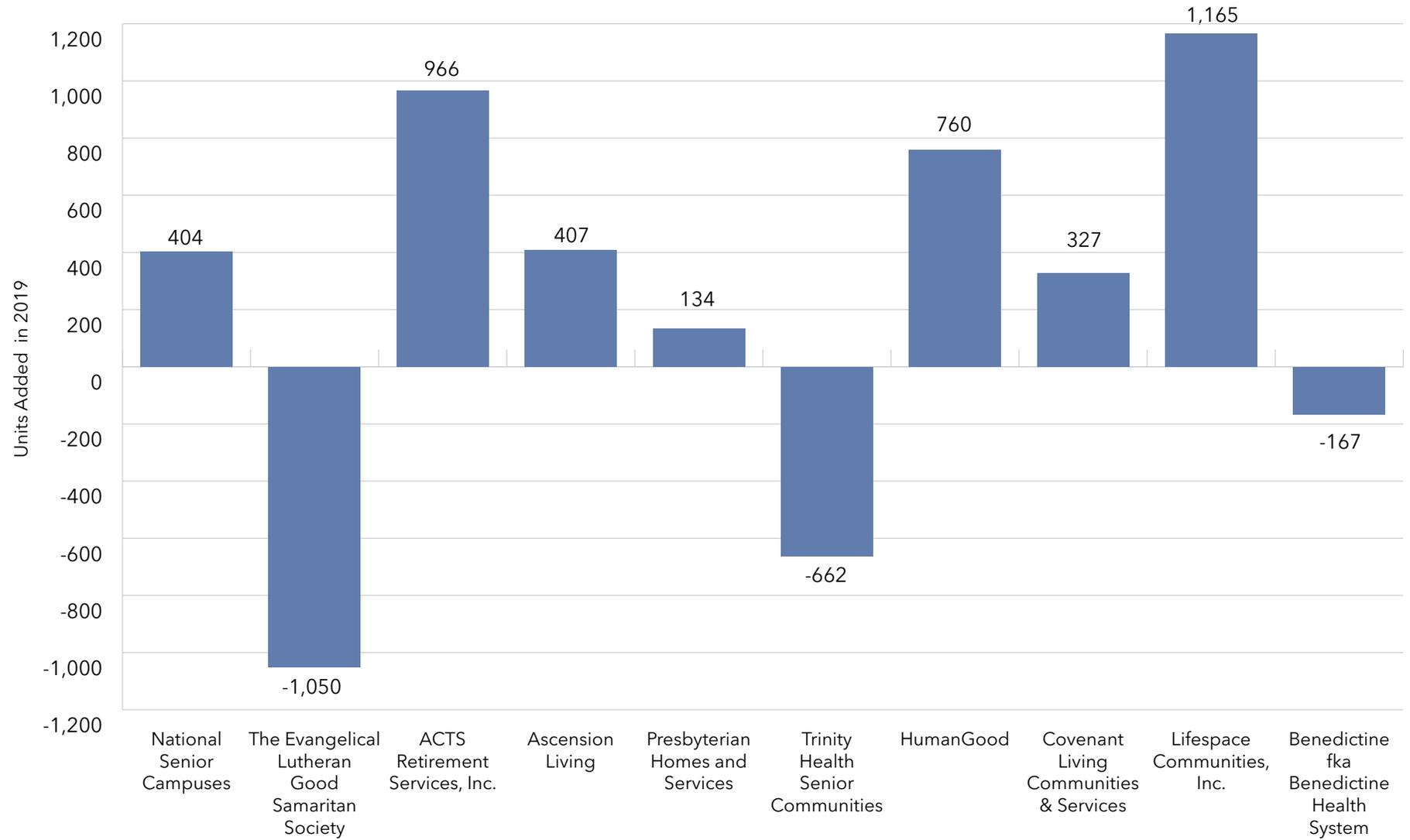
Growth and Change

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 Health, Ascension Living, and Trinity Senior Living Communities. Due to incomplete data for these organizations to the new list, the historical pace of growth charts were excluded from this year's publication.



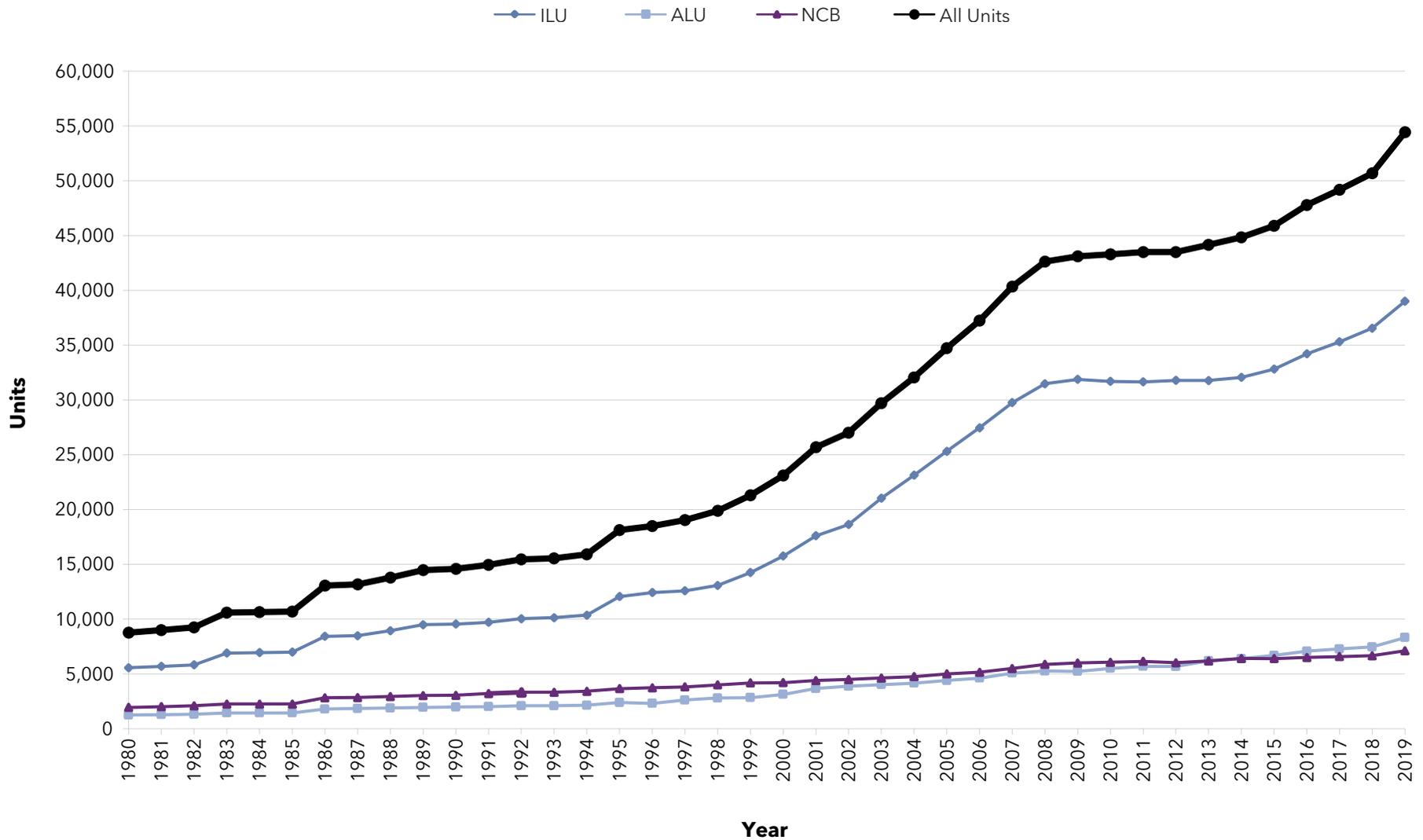


Growth: Growth of Largest 10 Systems

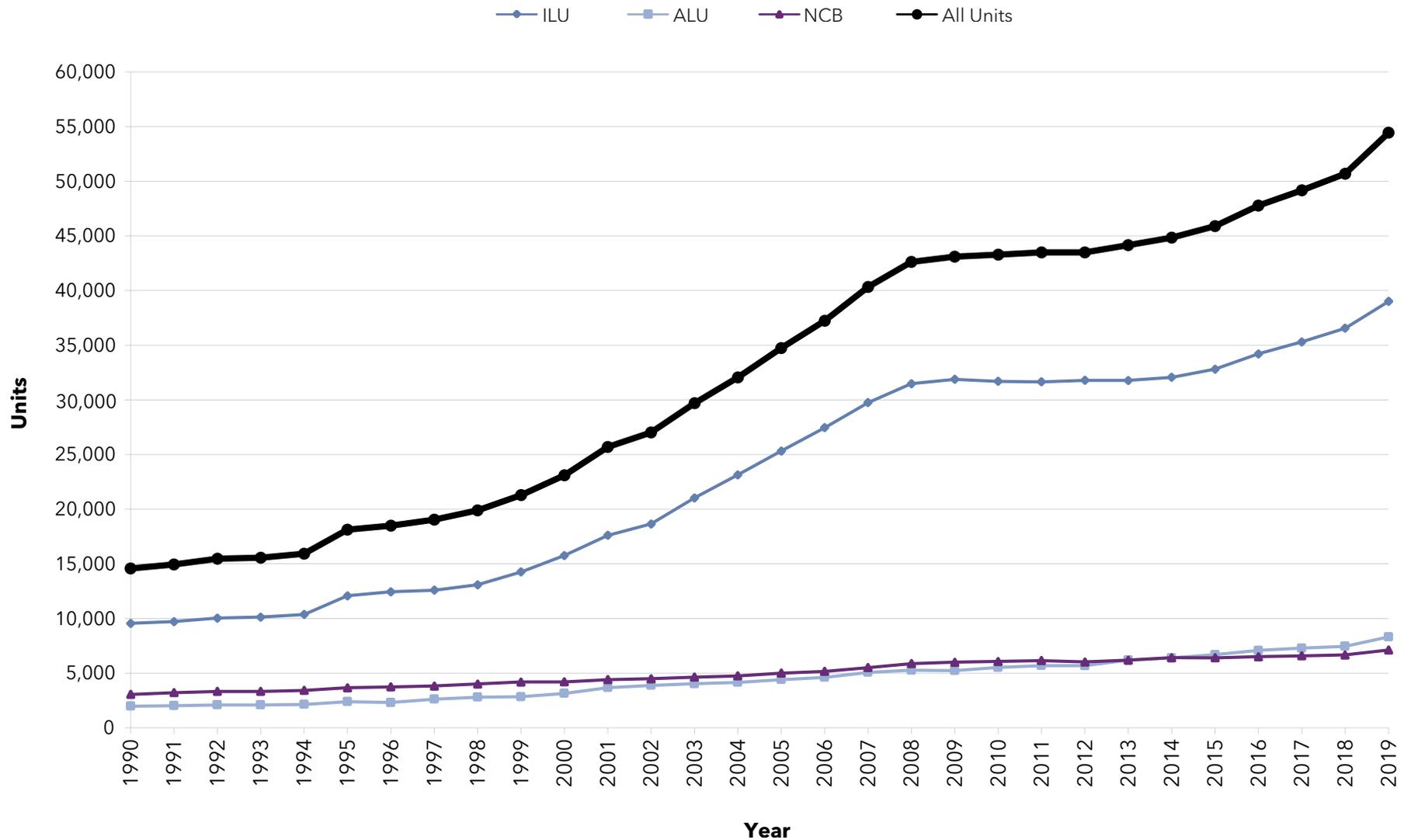


Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1980

(Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)

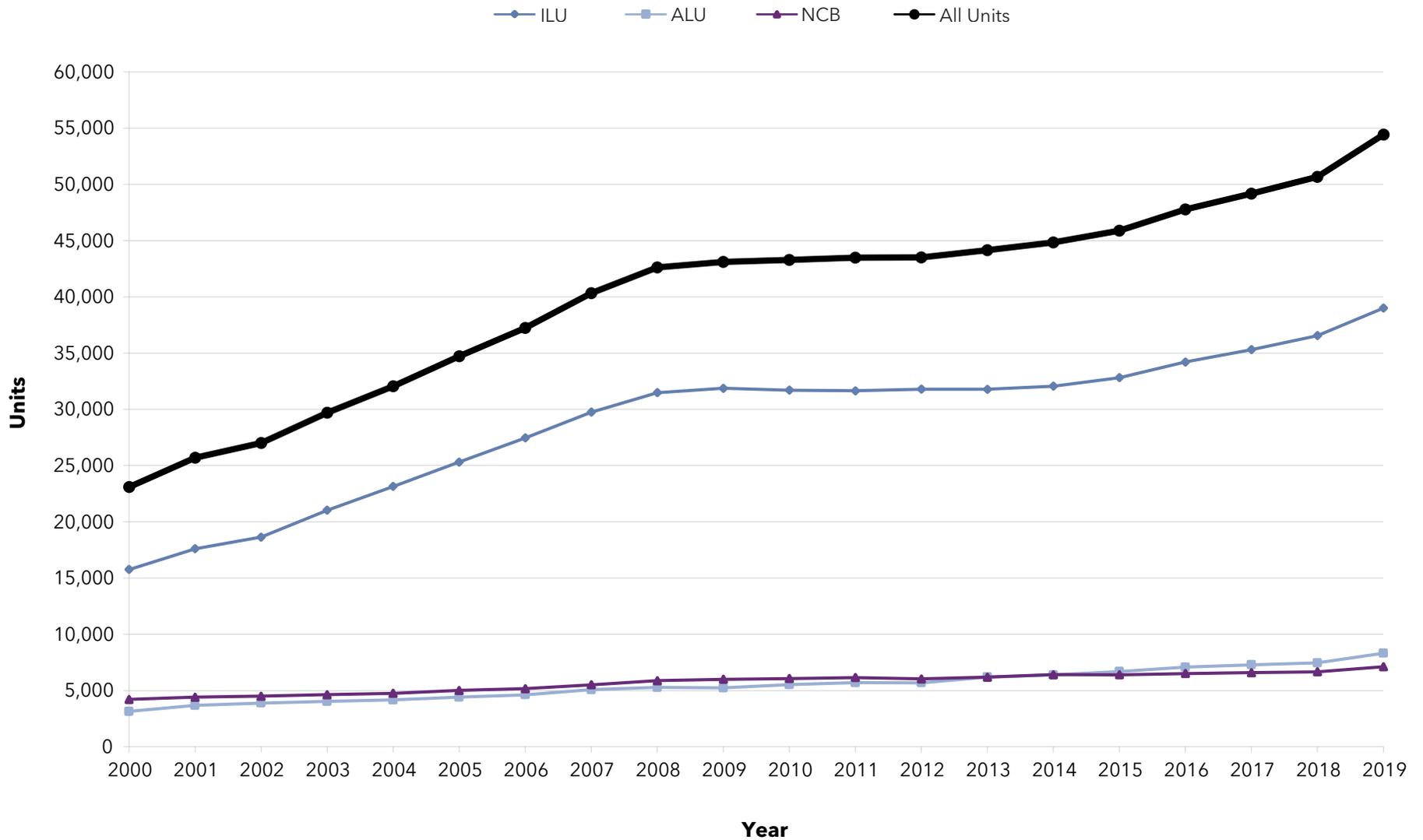


Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1990 (Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



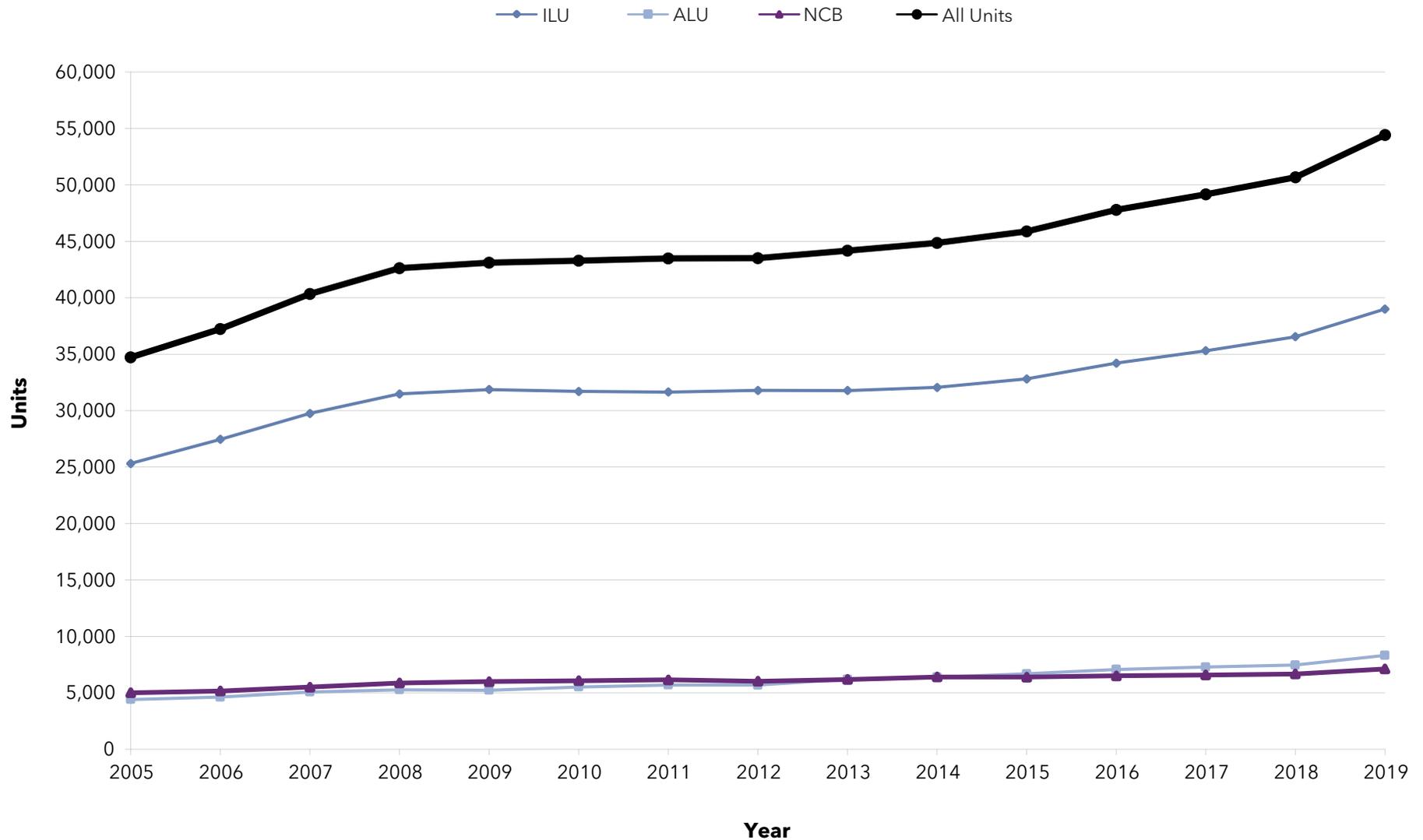
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2000

(Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



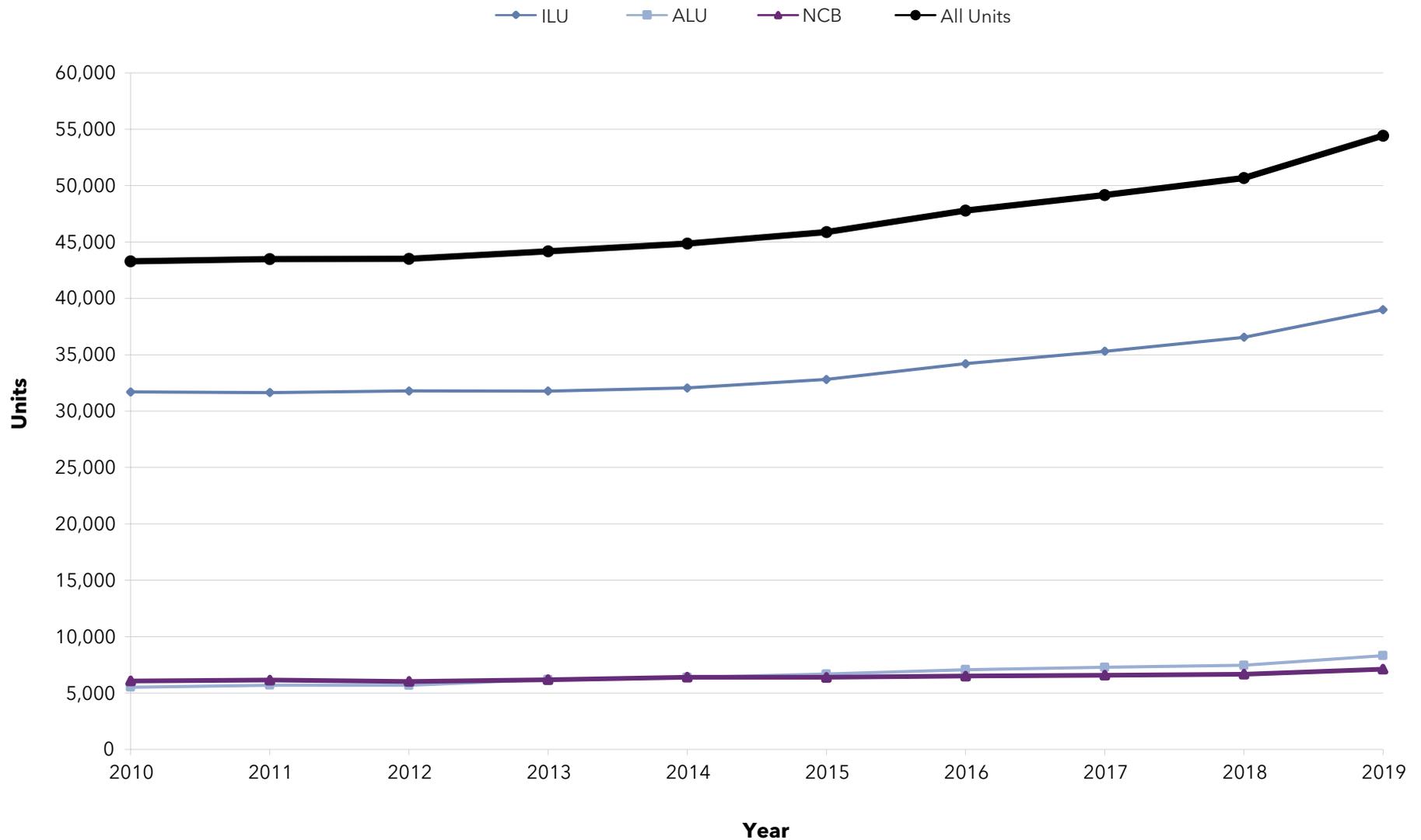
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005

(Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



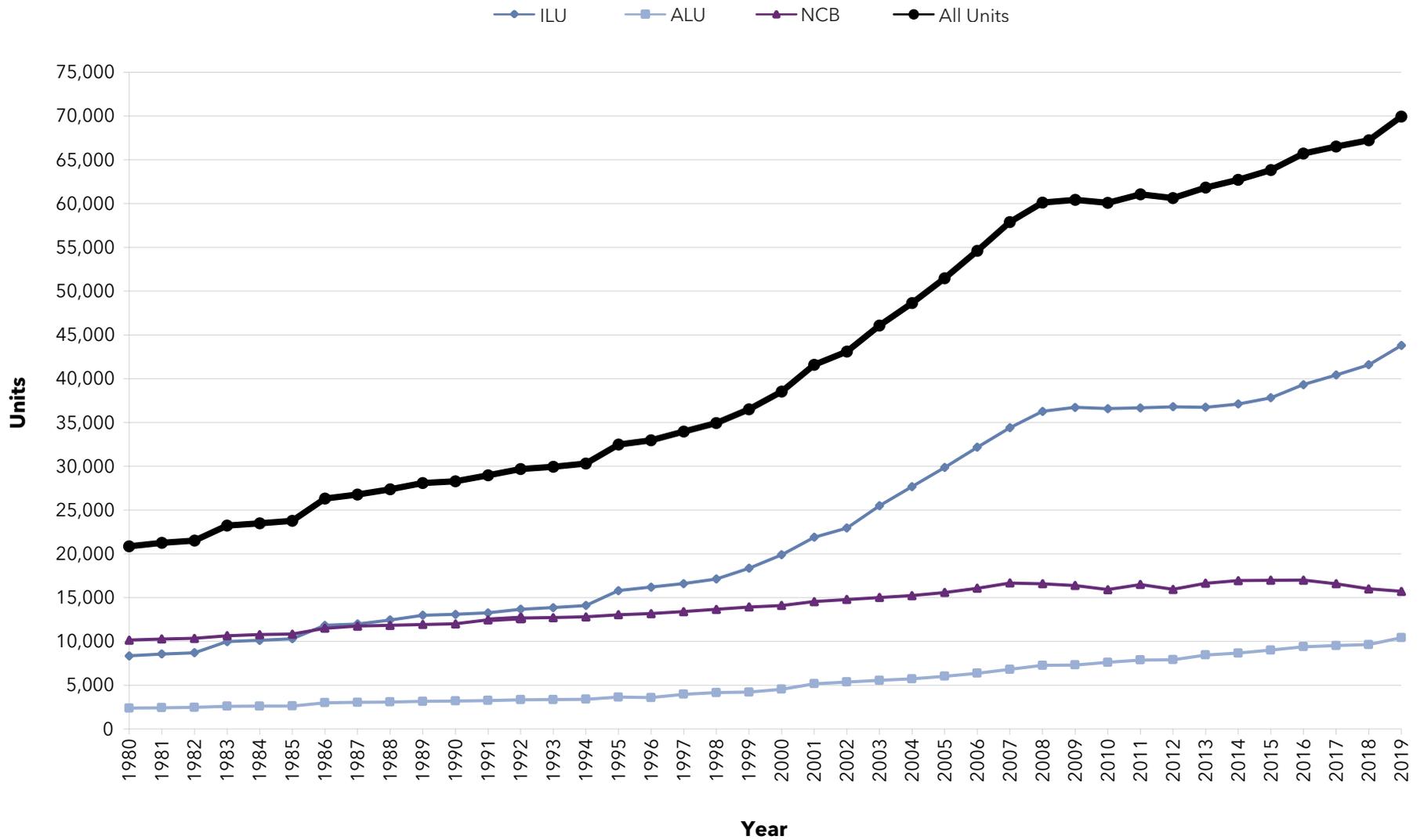
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2010

(Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



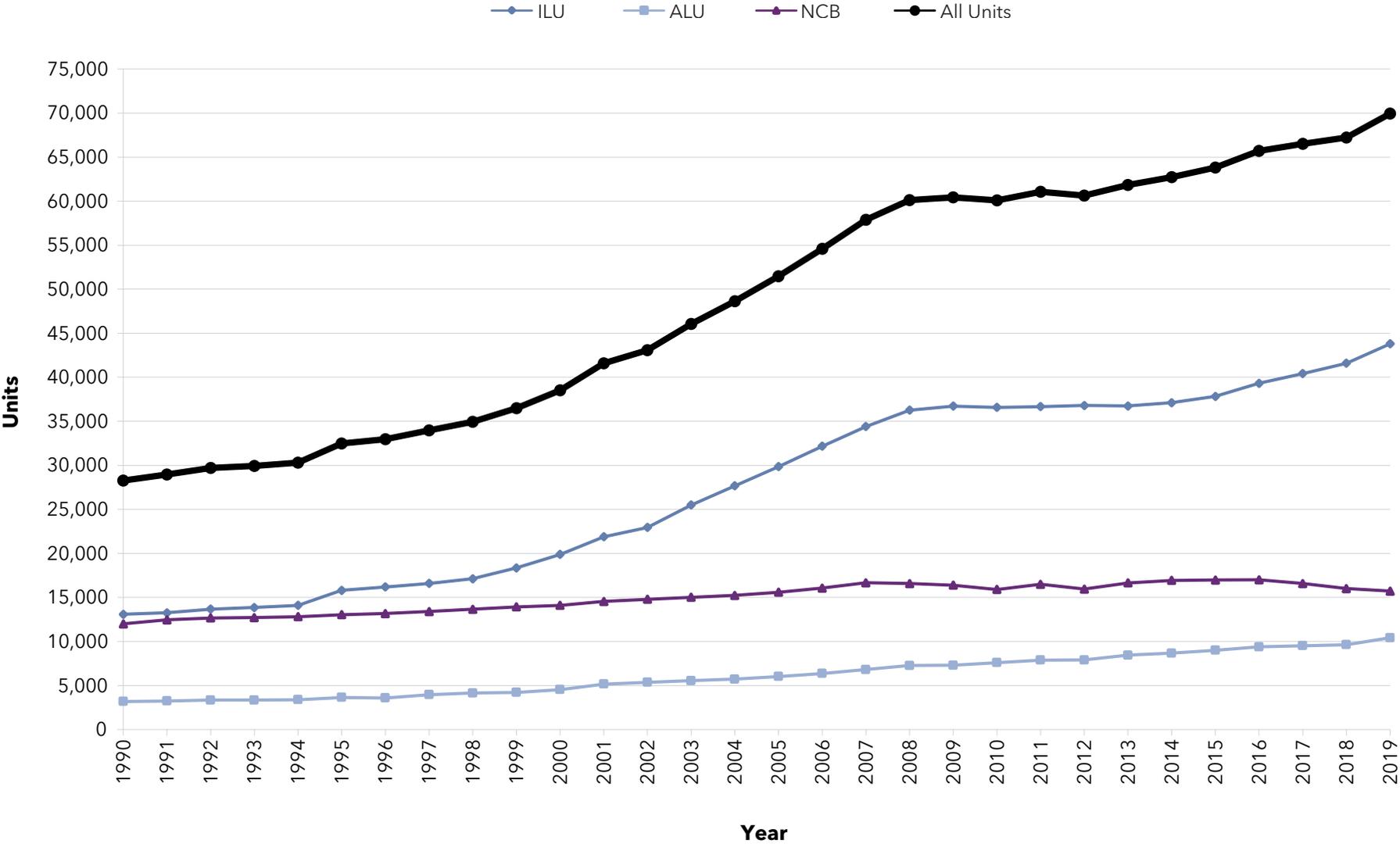
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1980

(Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



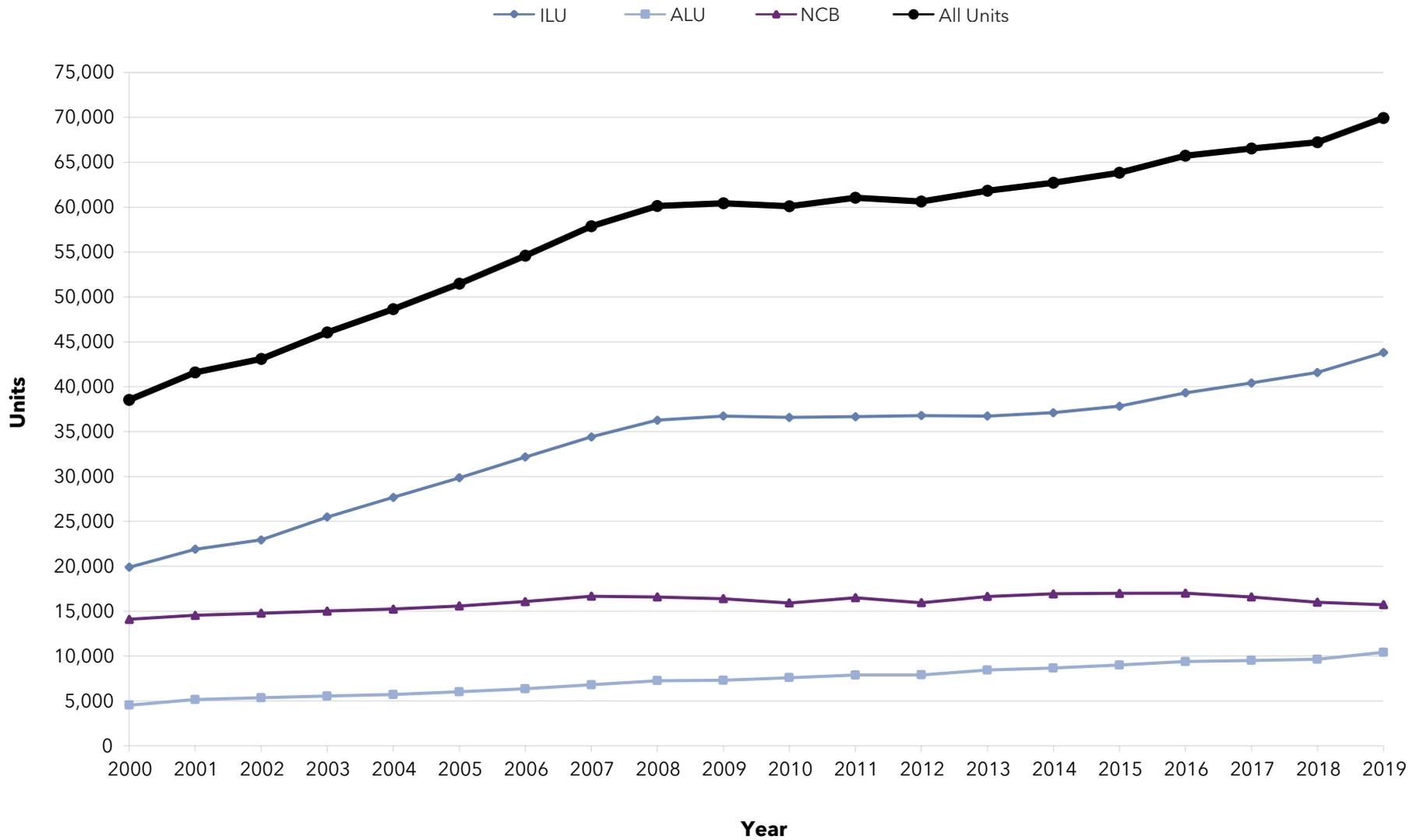
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1990

(Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)

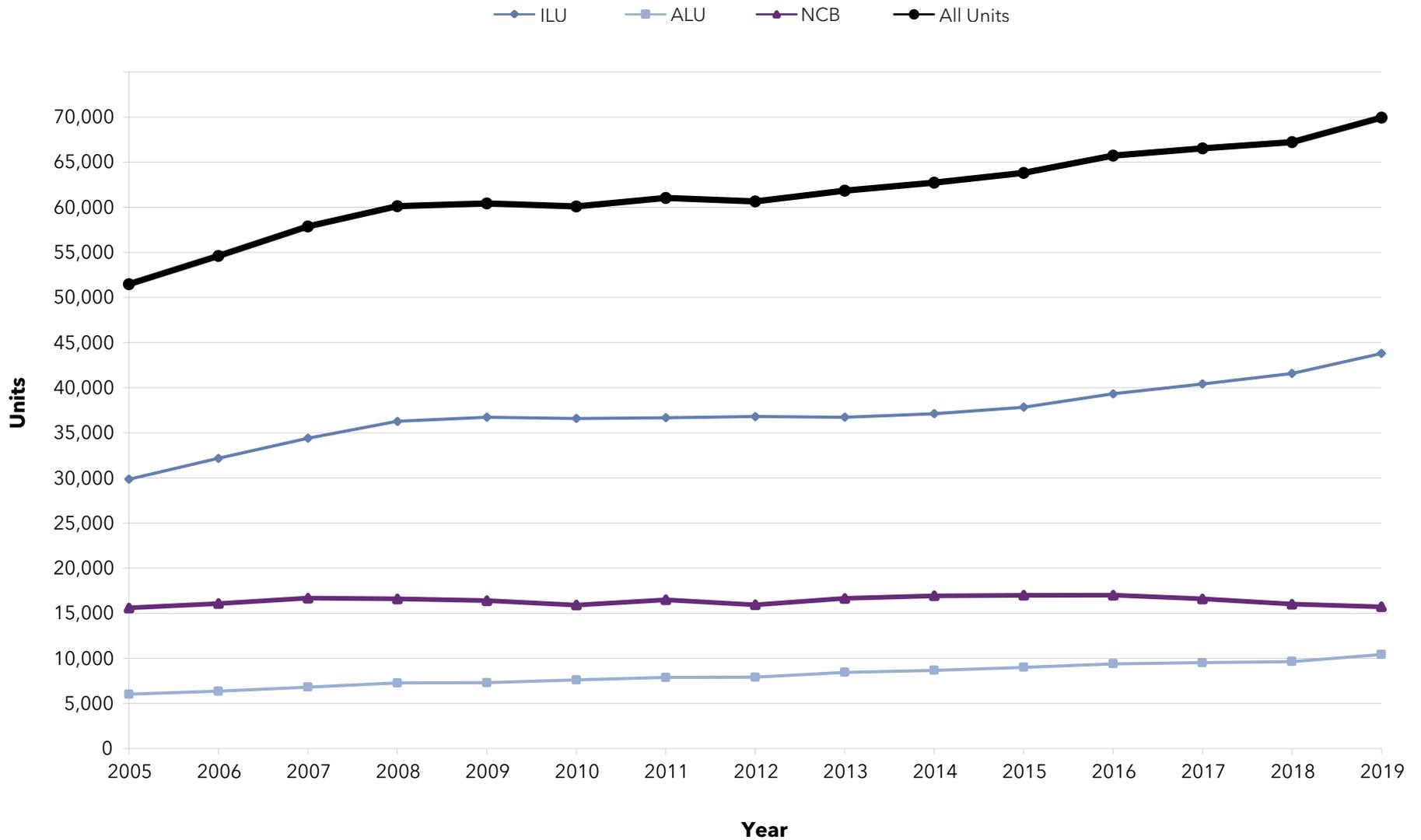


Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2000

(Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)

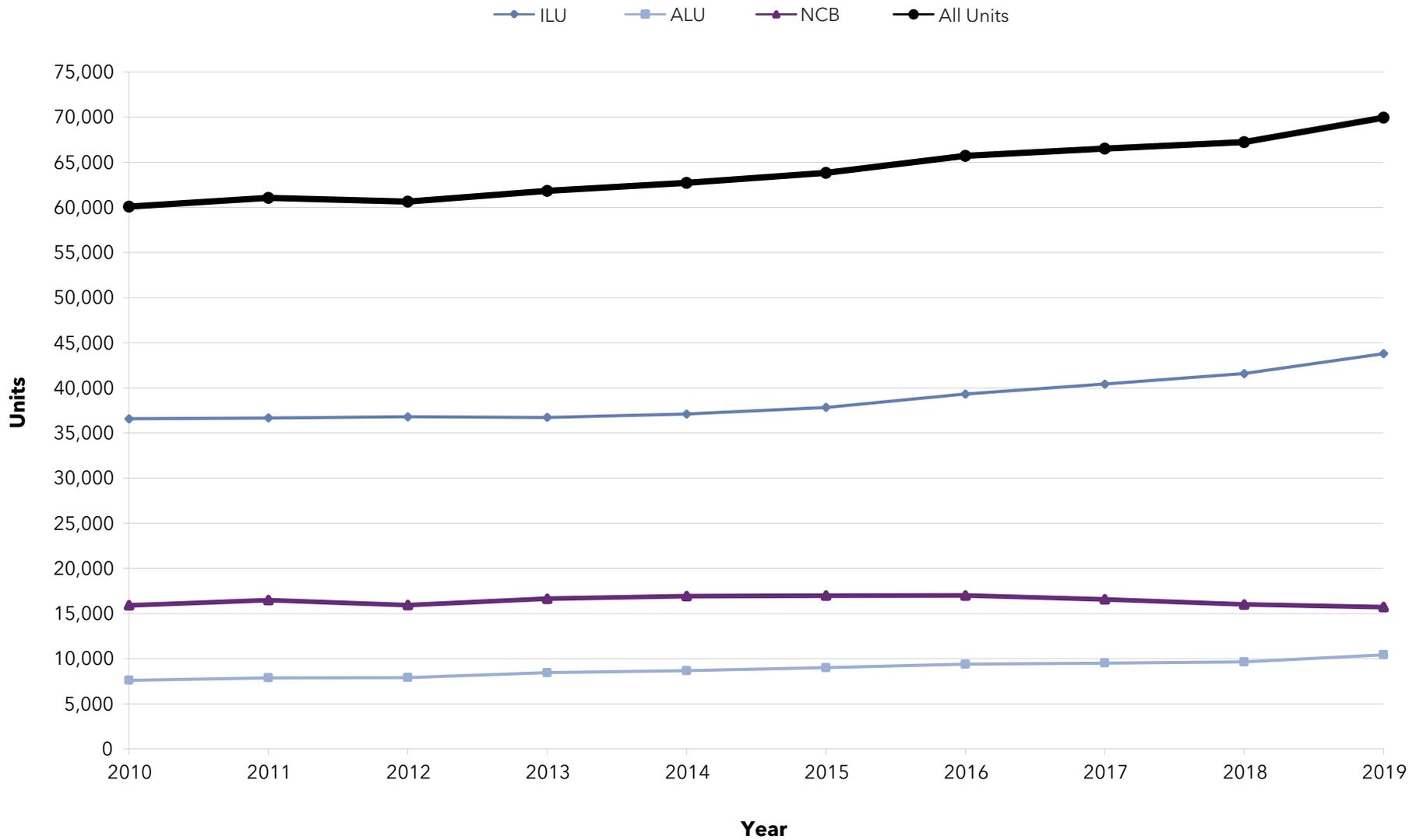


Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005 (Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005

(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-s) trace the growth patterns of 20 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. Five 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 #4), Trinity Health Senior Communities (LZ 200 #6), Benedictine Health (LZ 200 #10), and The Carmelite System (LZ 200 #19). The Pace of Growth charts show the different methods of change the systems are

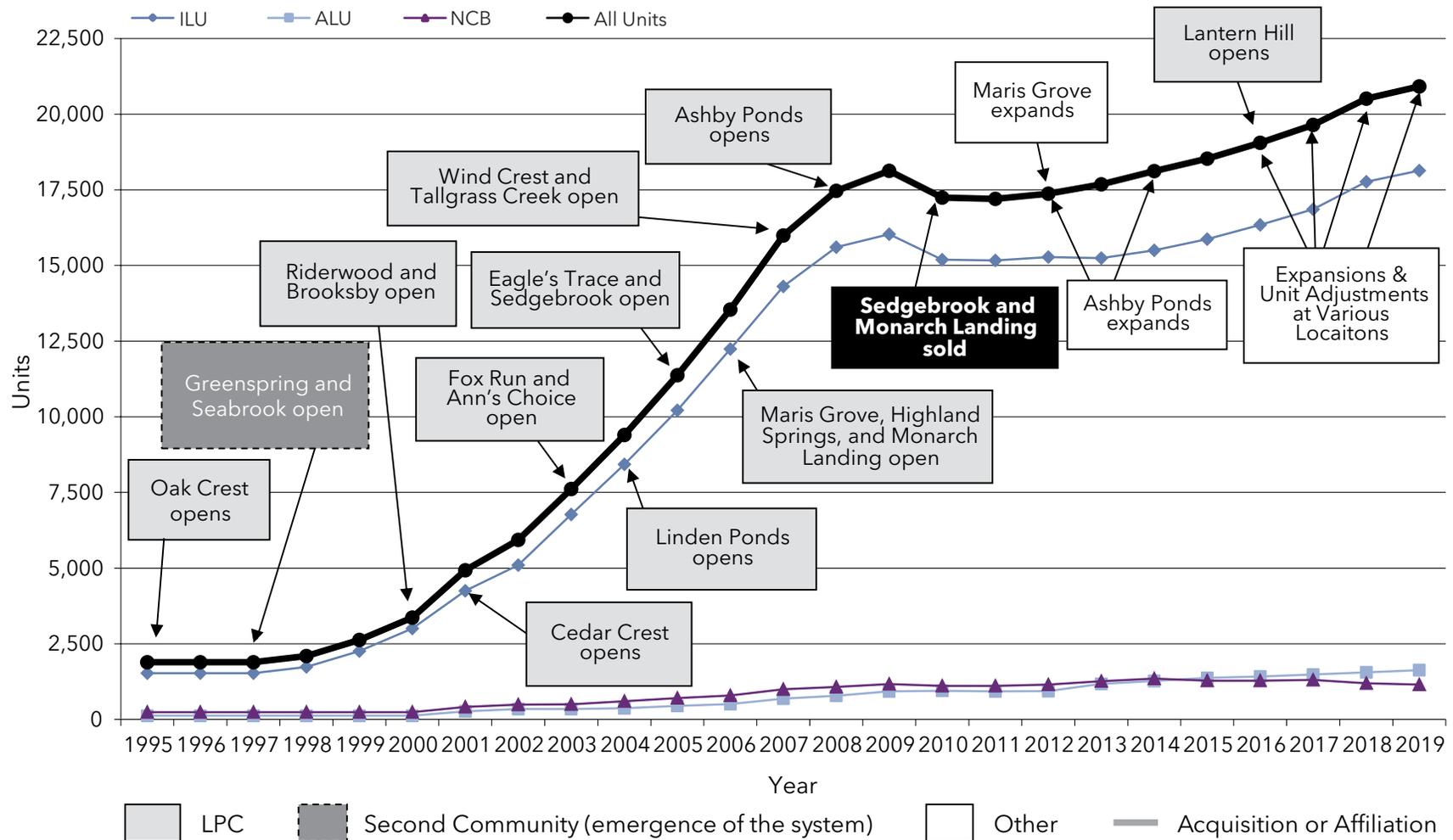
employing. Significant new community construction and expansions are noted, with the addition of the second community highlighted in a dashed box. Mergers and acquisitions (gray-framed box) and dispositions (bold black box) are also highlighted.

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



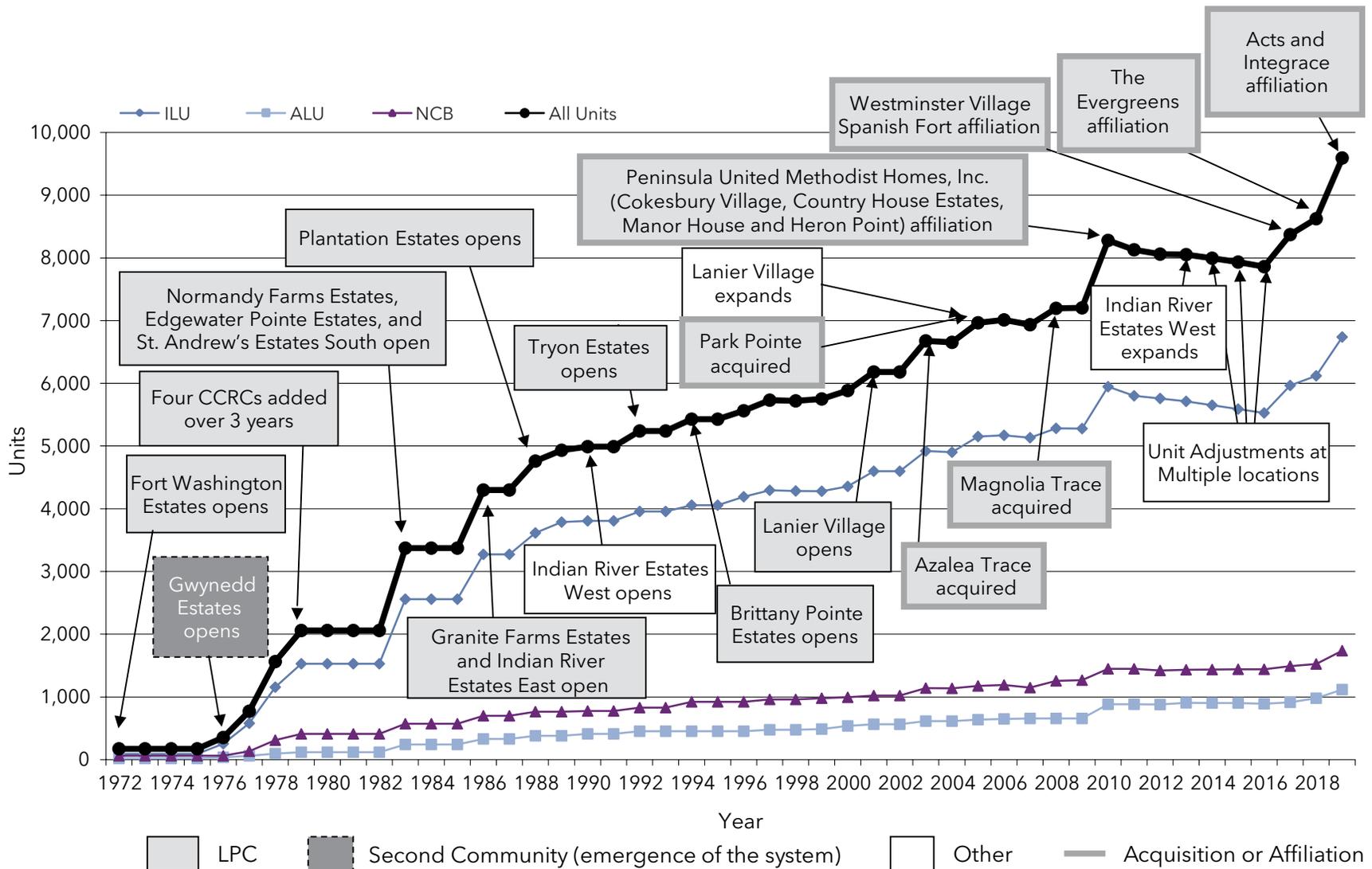
Growth: Pace of Growth

National Senior Campuses (MA)



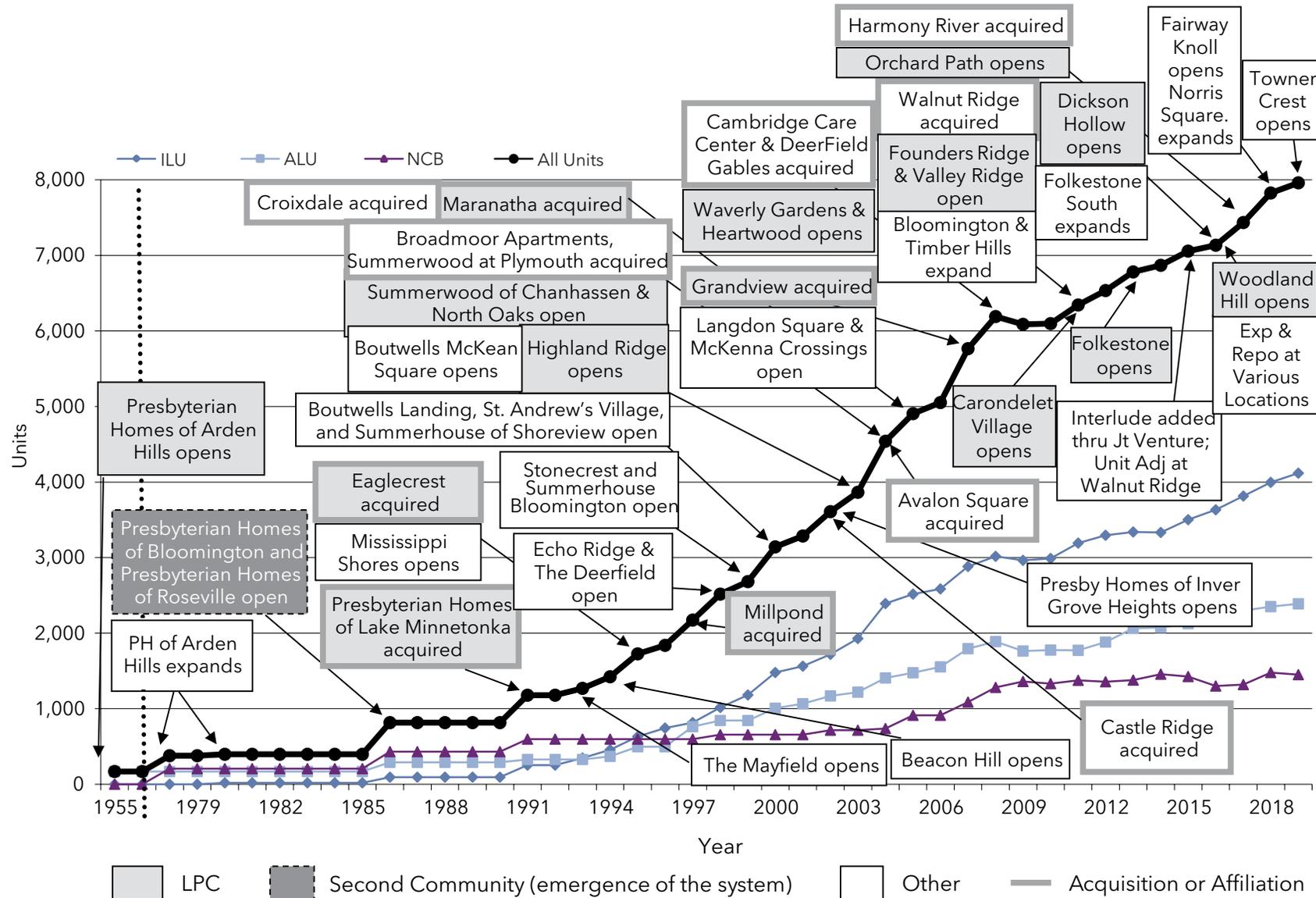
Growth: Pace of Growth

ACTS Retirement-Life Communities (PA)



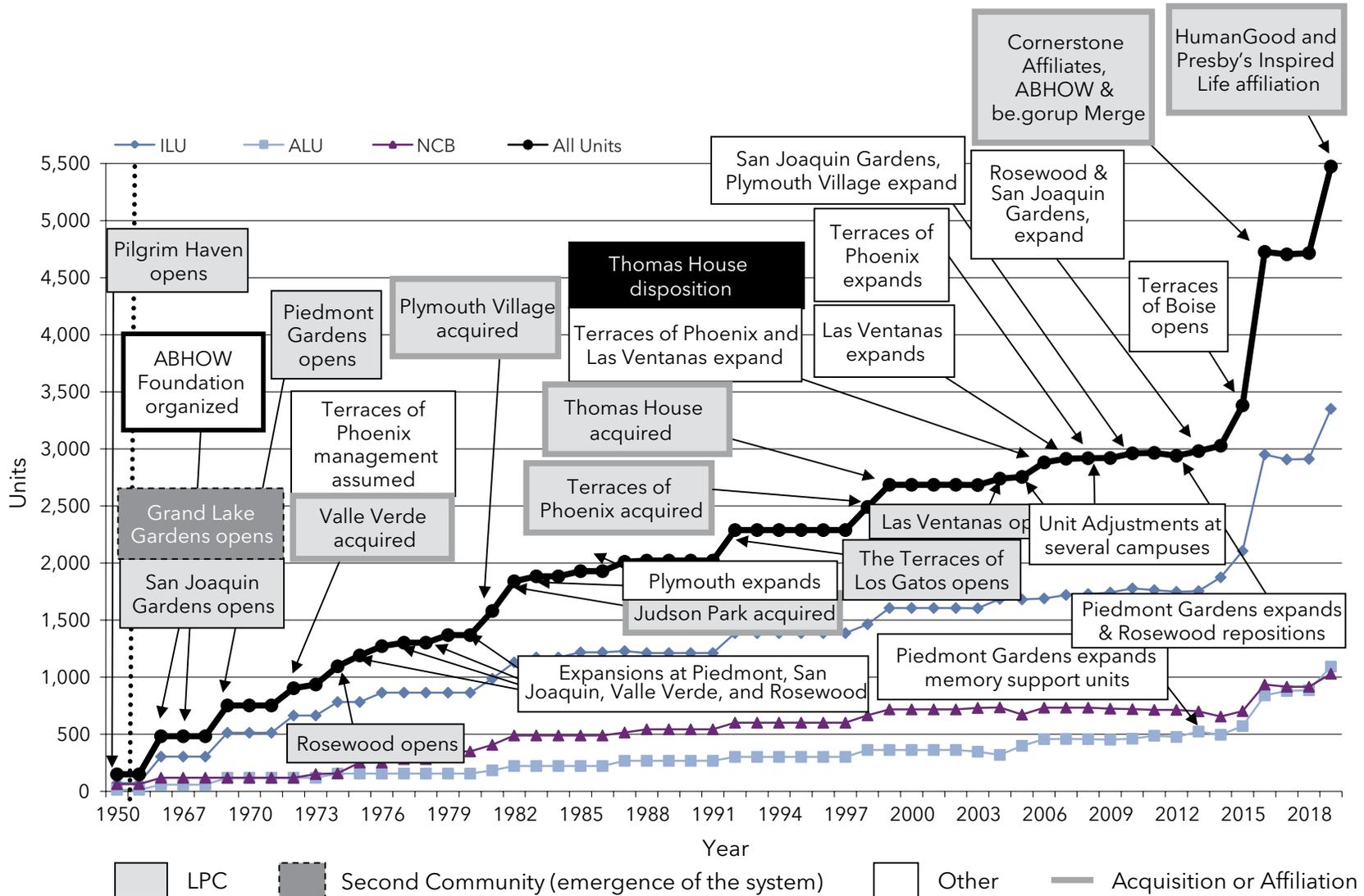
Growth: Pace of Growth

Presbyterian Homes and Services (MN)



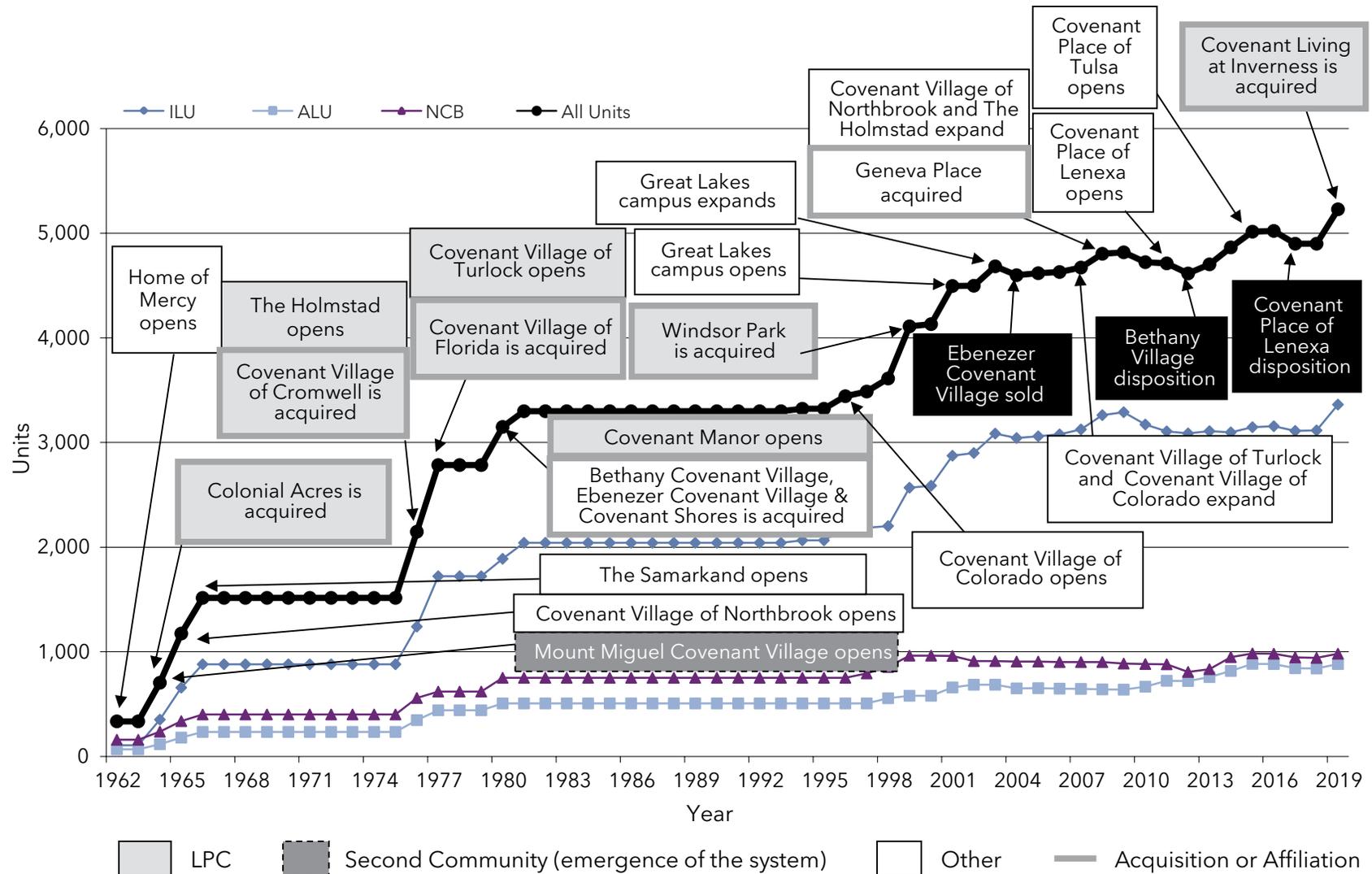
Growth: Pace of Growth

HumanGood (CA)



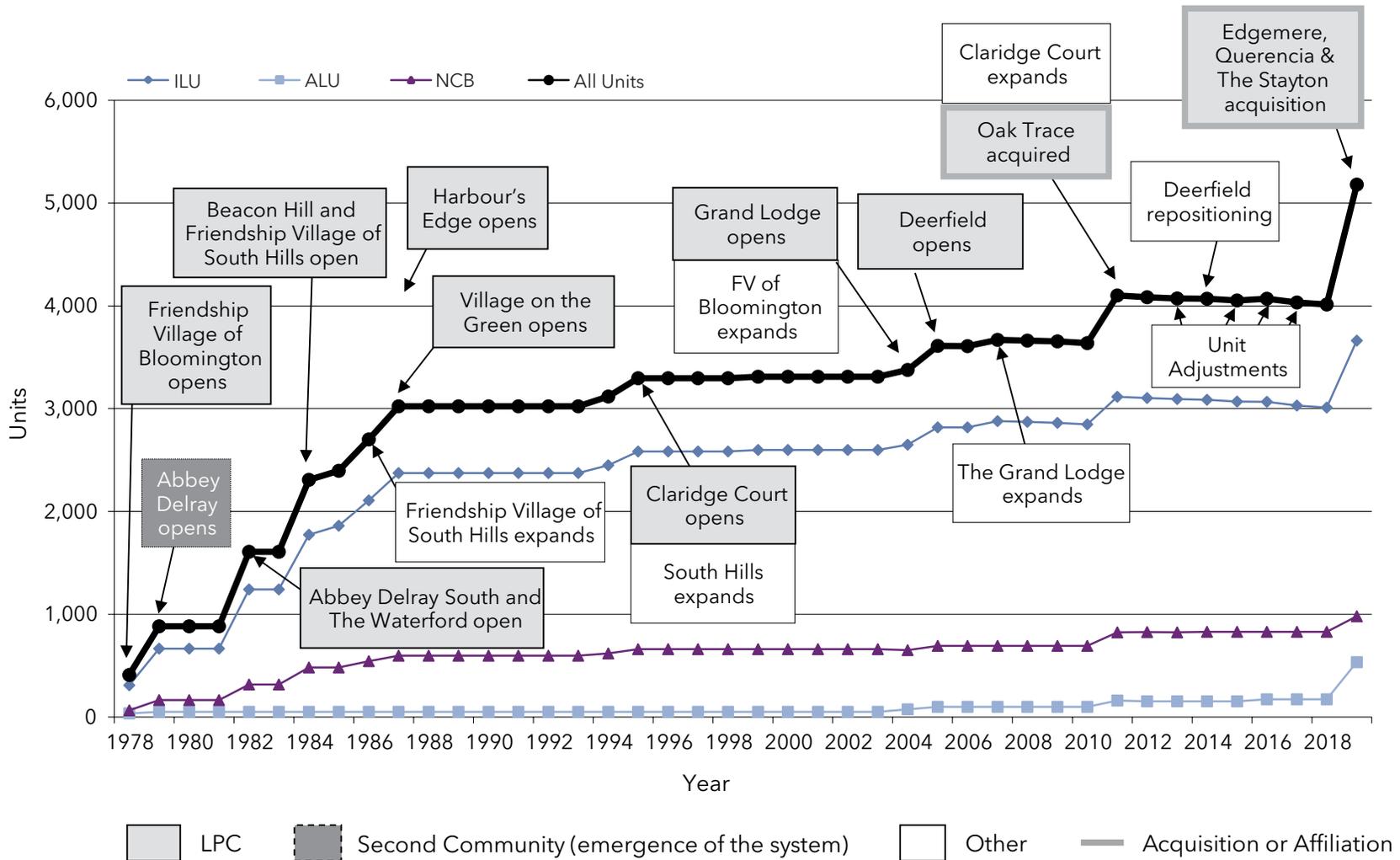
Growth: Pace of Growth

Covenant Living Communities & Services (IL)



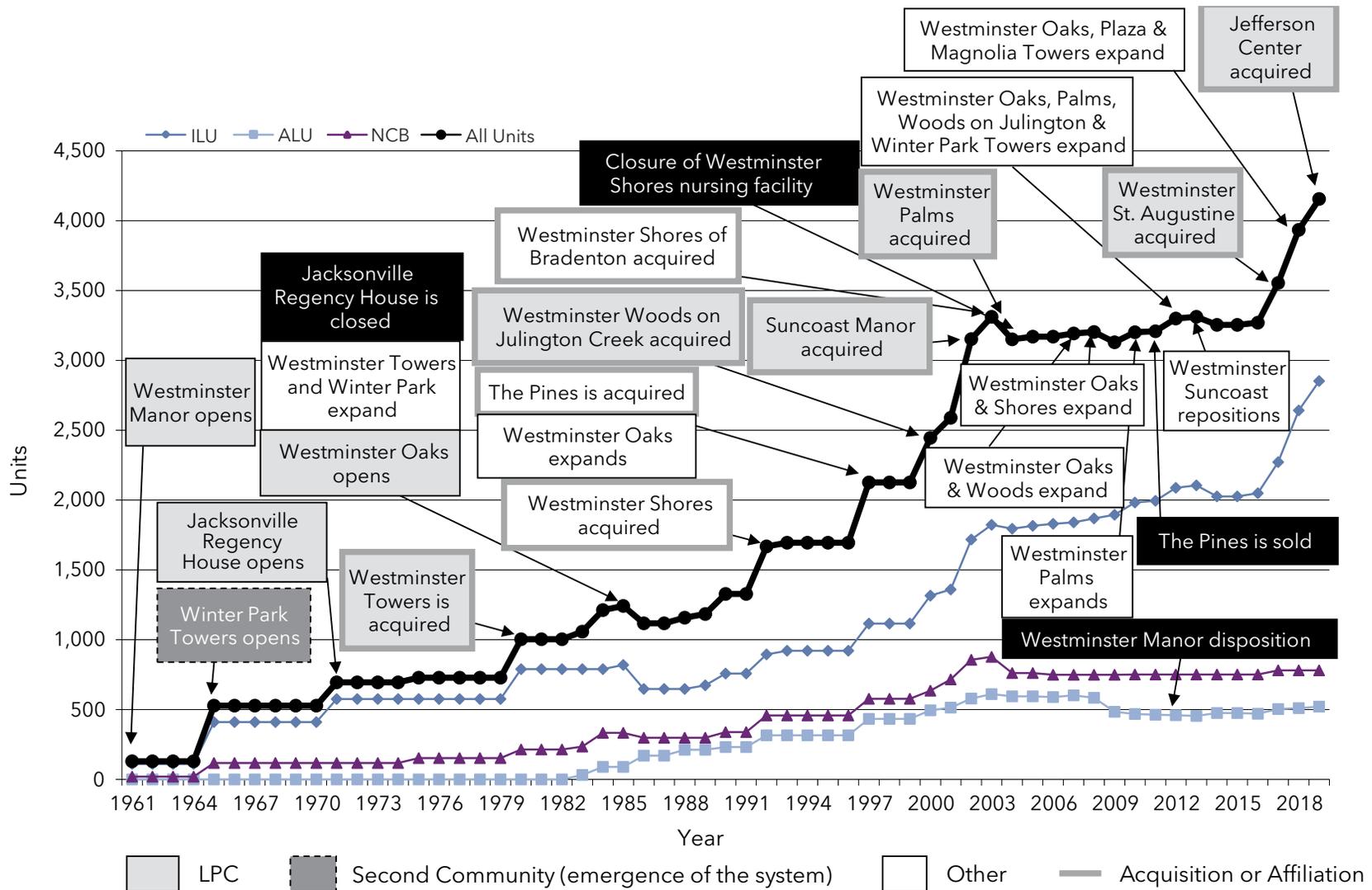
Growth: Pace of Growth

Lifespace Communities, Inc. (IA)



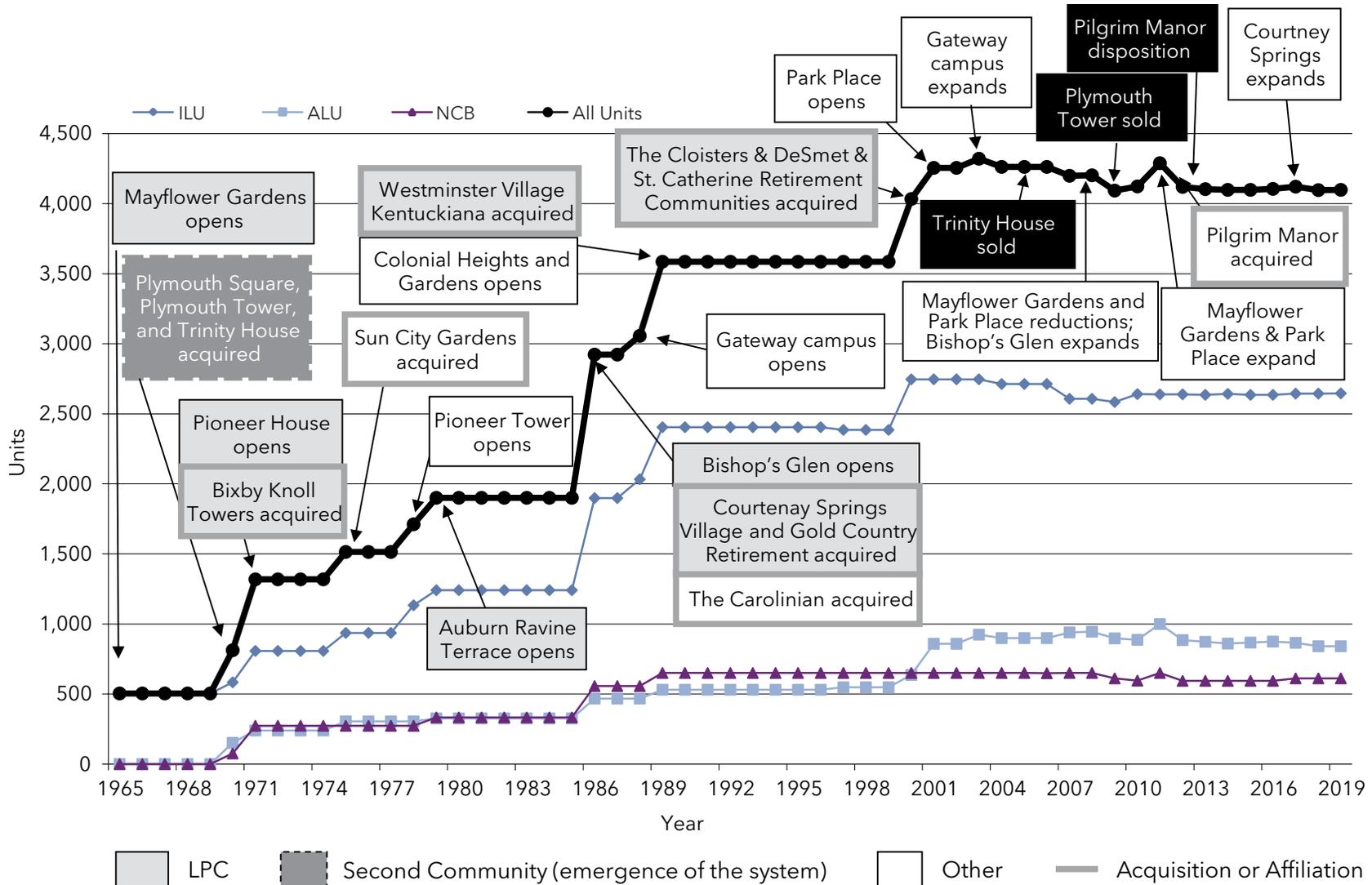
Growth: Pace of Growth

Westminster Communities of Florida (FL)



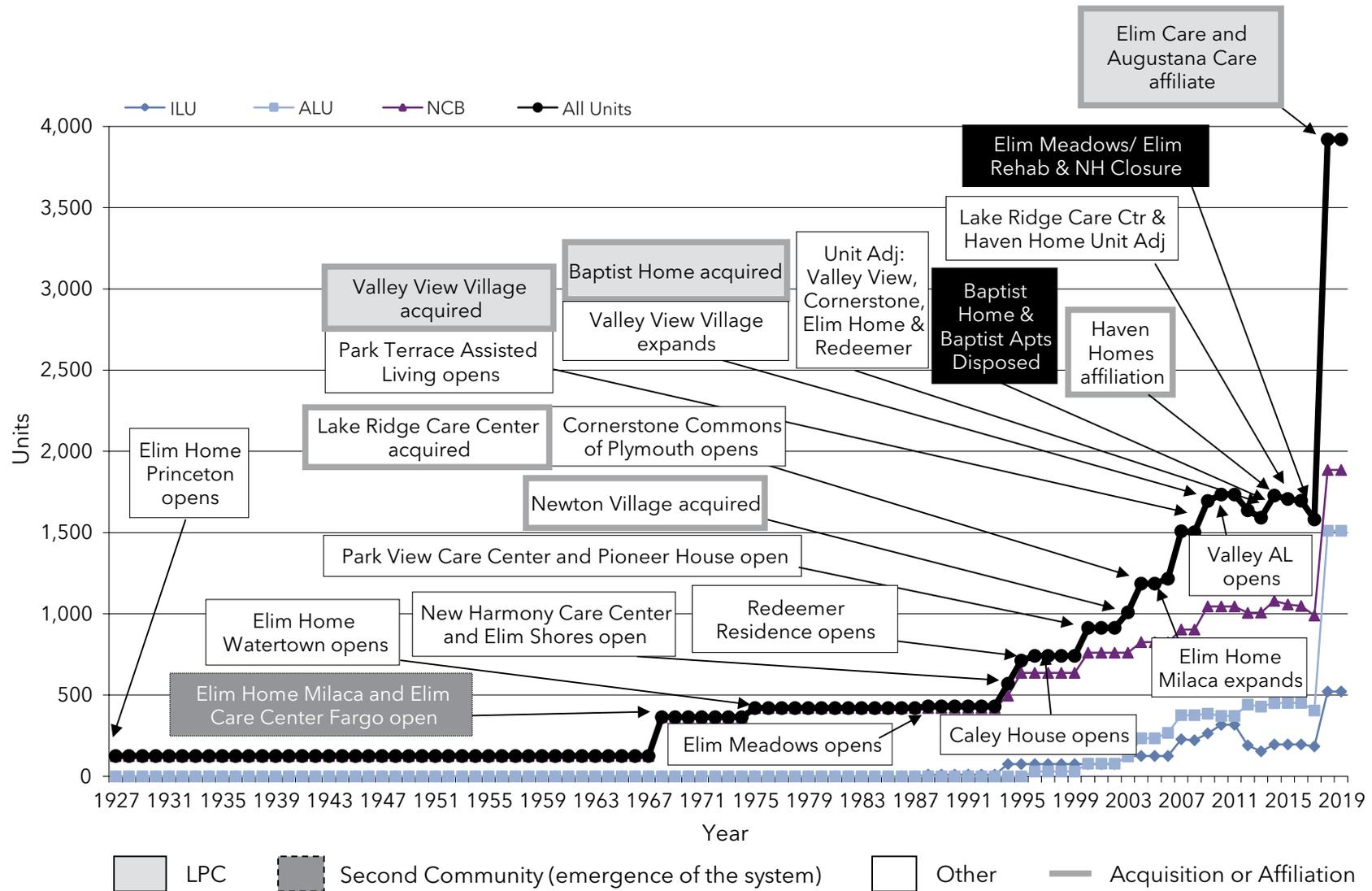
Growth: Pace of Growth

Retirement Housing Foundation (CA)



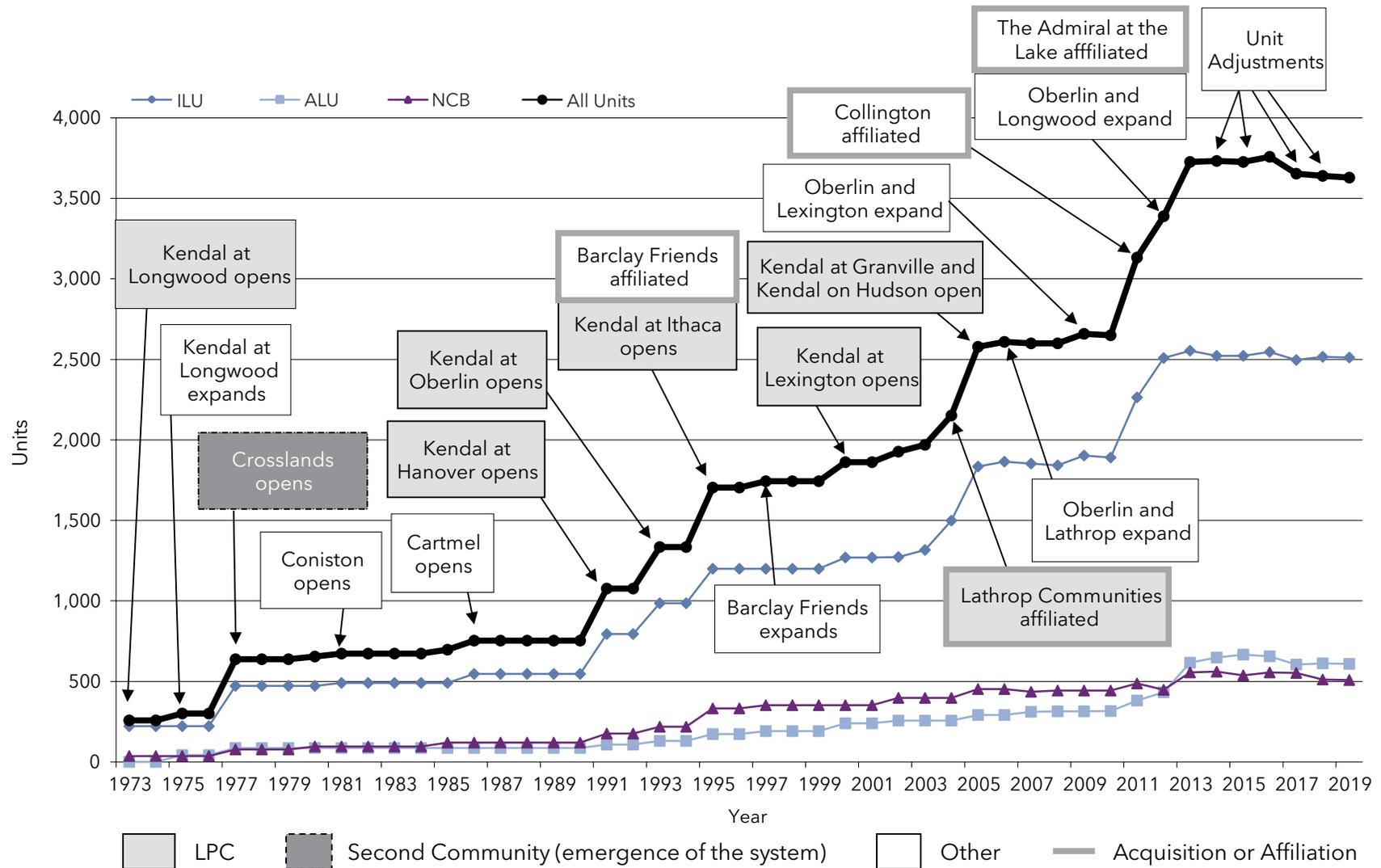
Growth: Pace of Growth

Cassia (MN)



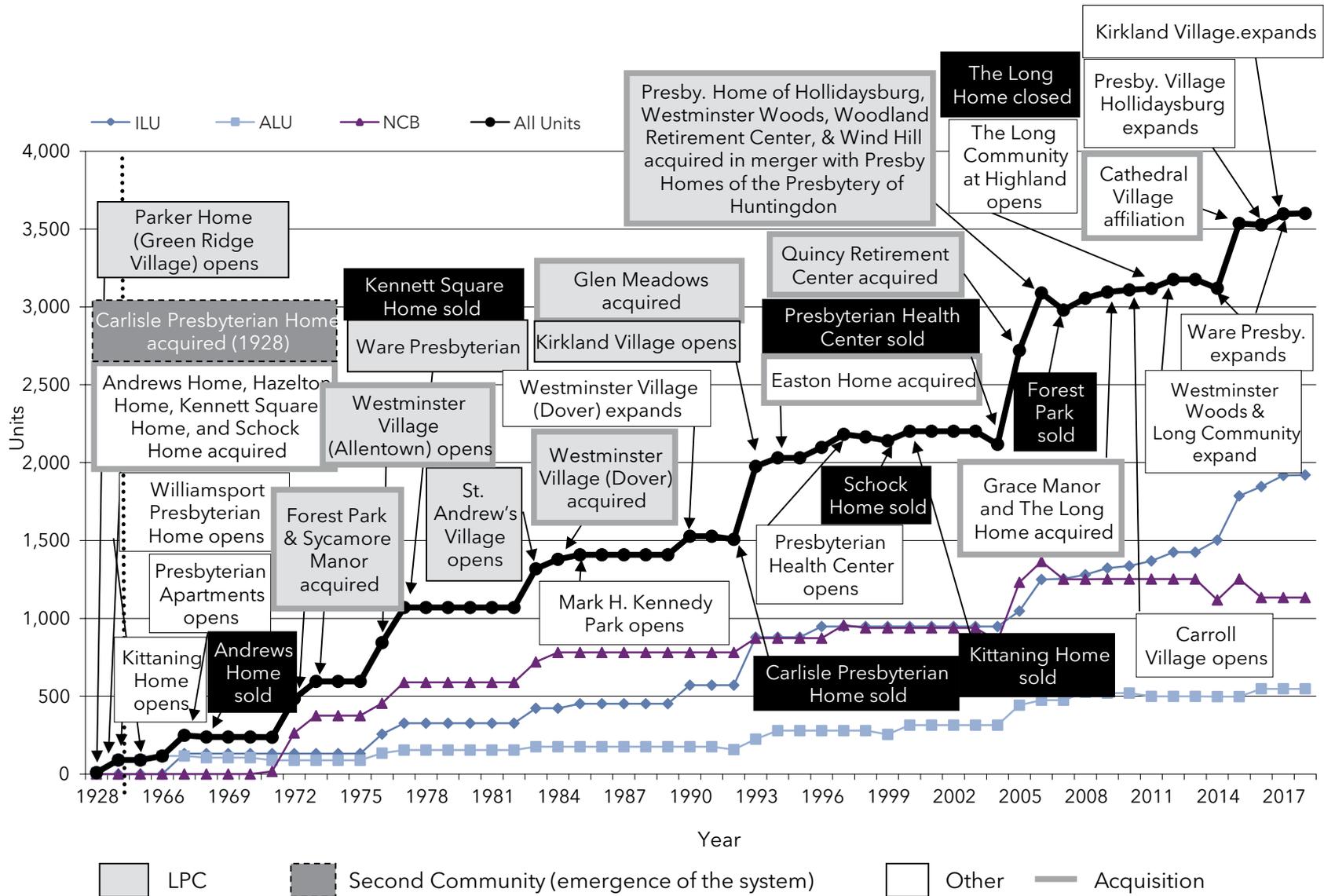
Growth: Pace of Growth

The Kendal Corporation (PA)

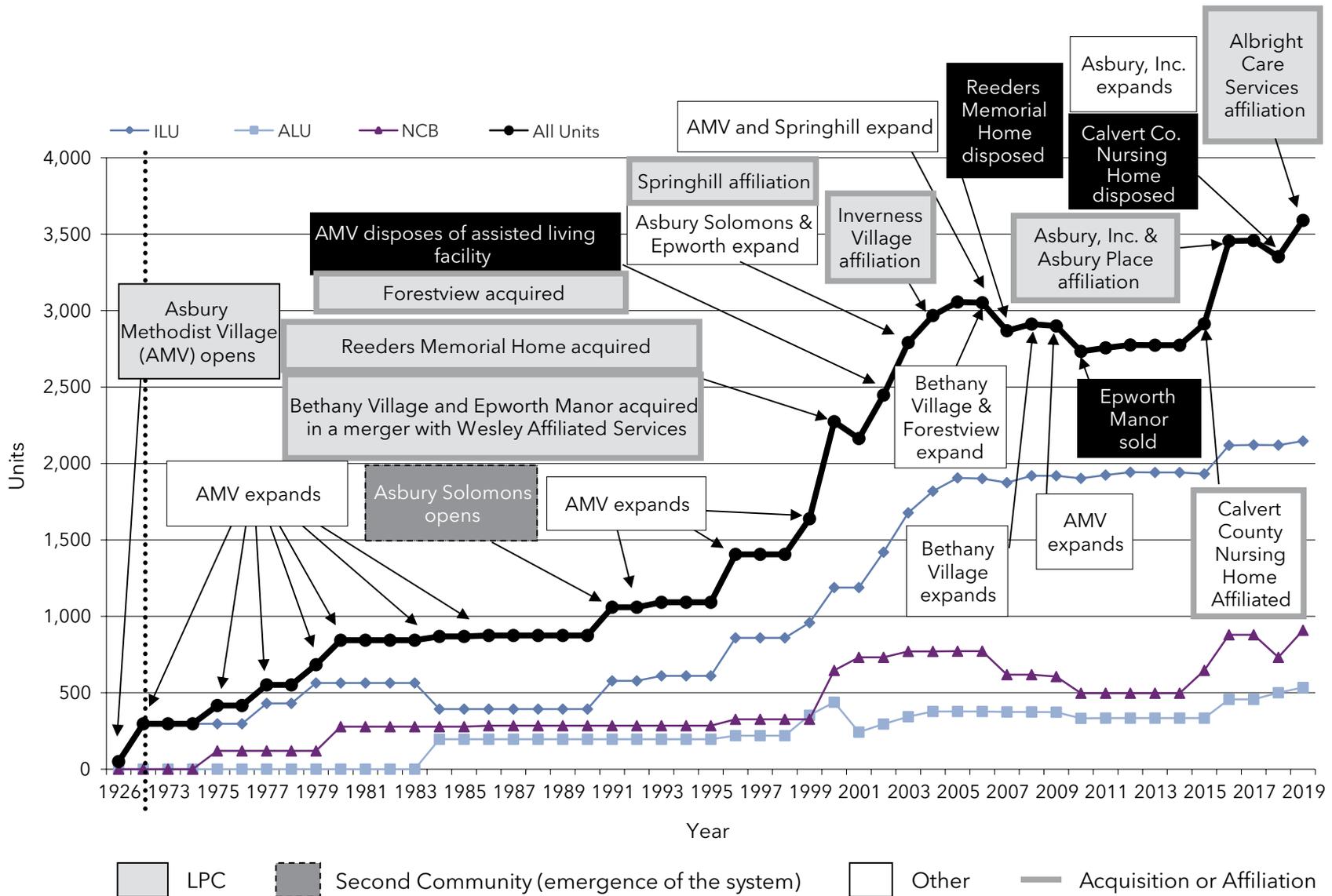


Growth: Pace of Growth

Presbyterian Senior Living (PA)

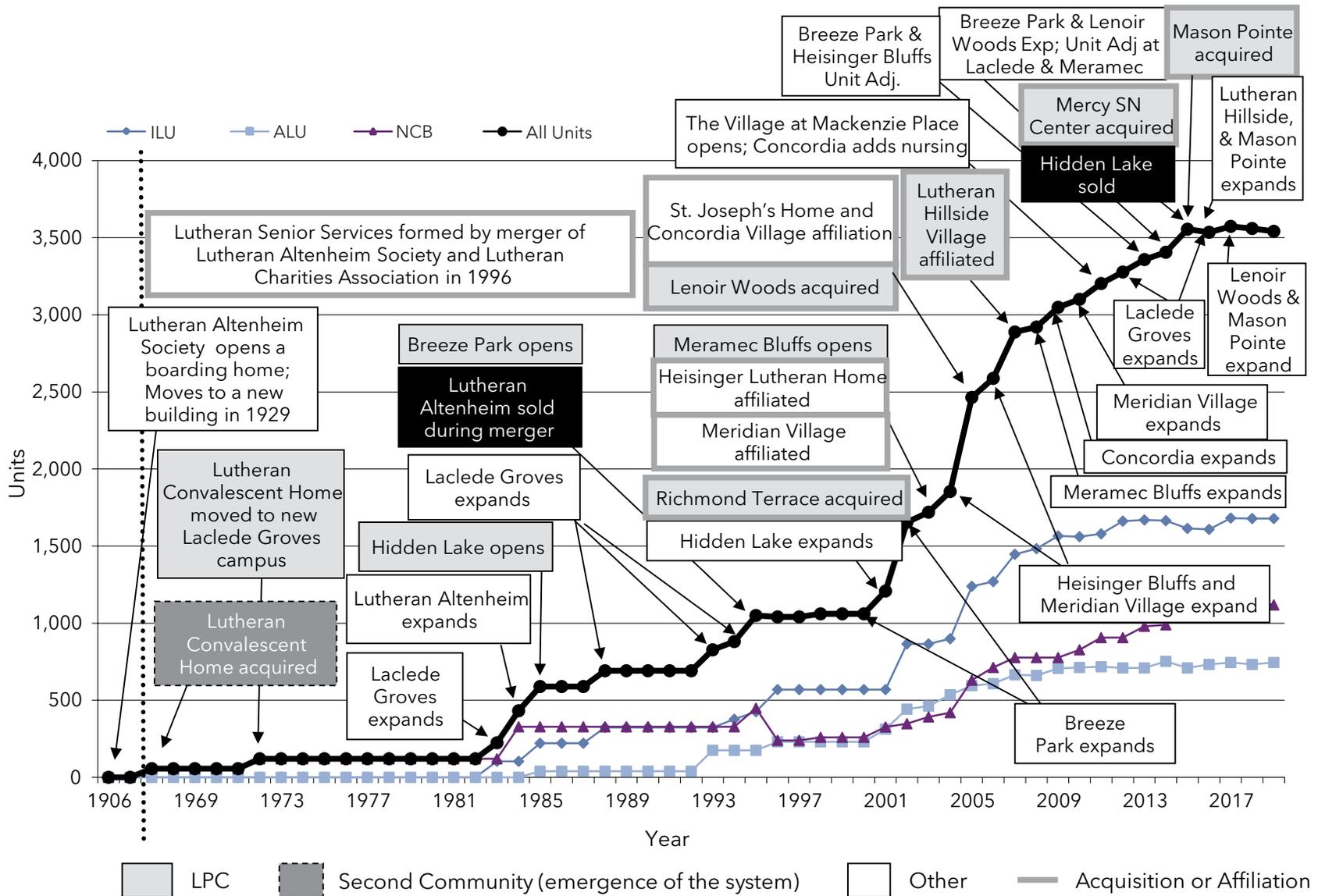


Growth: Pace of Growth Asbury Communities (MD)



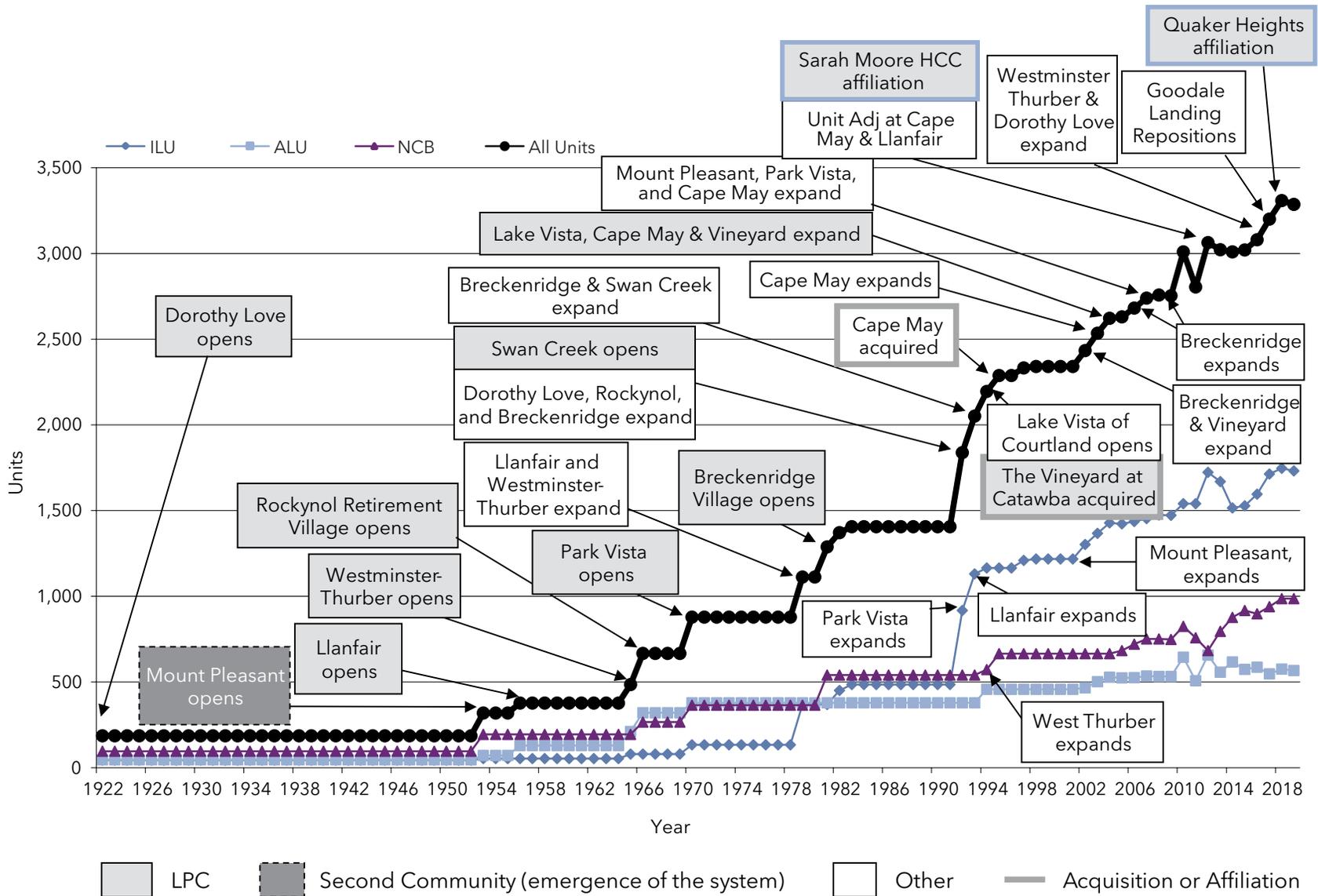
Growth: Pace of Growth

Lutheran Senior Services (MO)



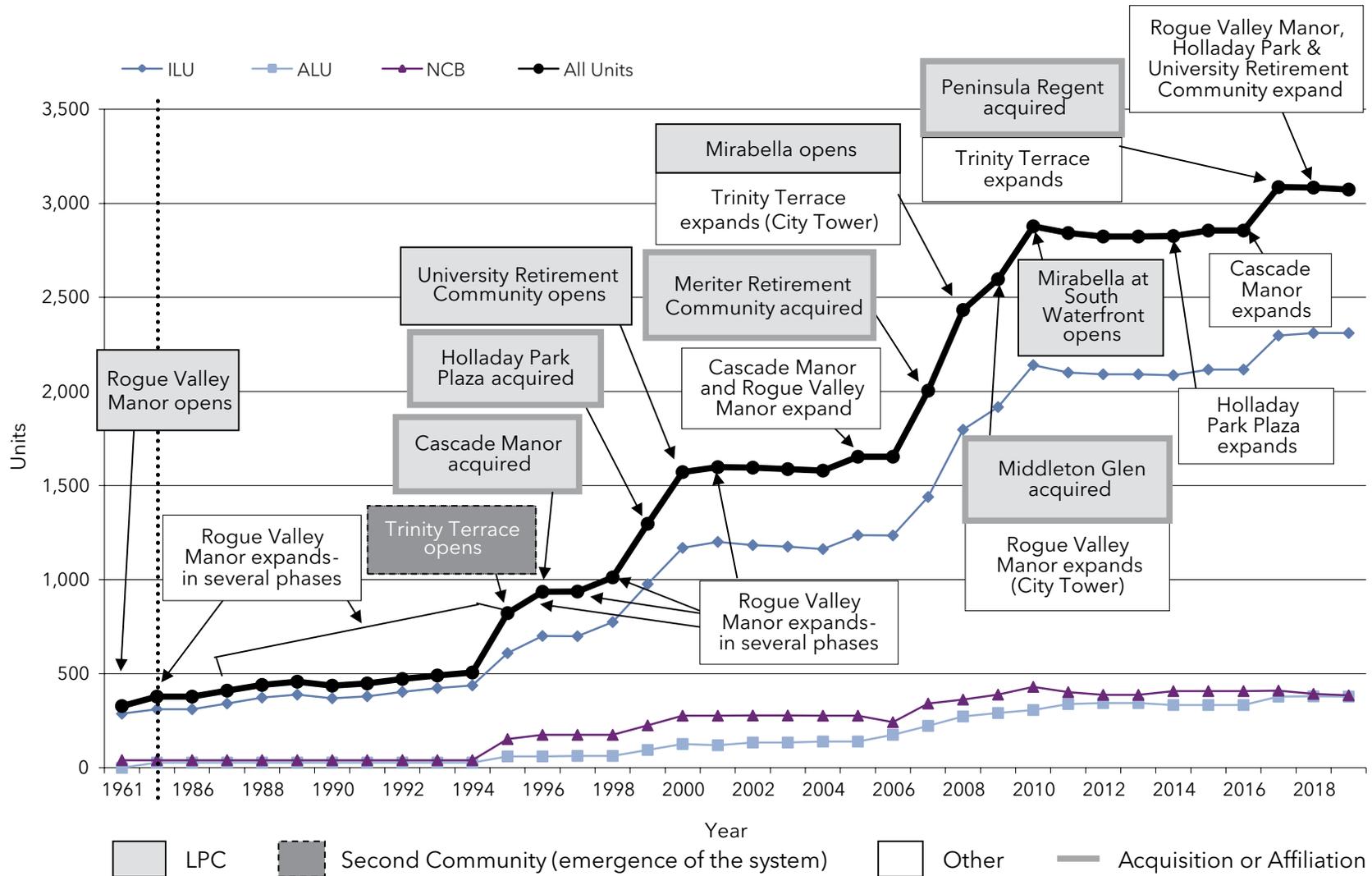
Growth: Pace of Growth

Ohio Living (OH)



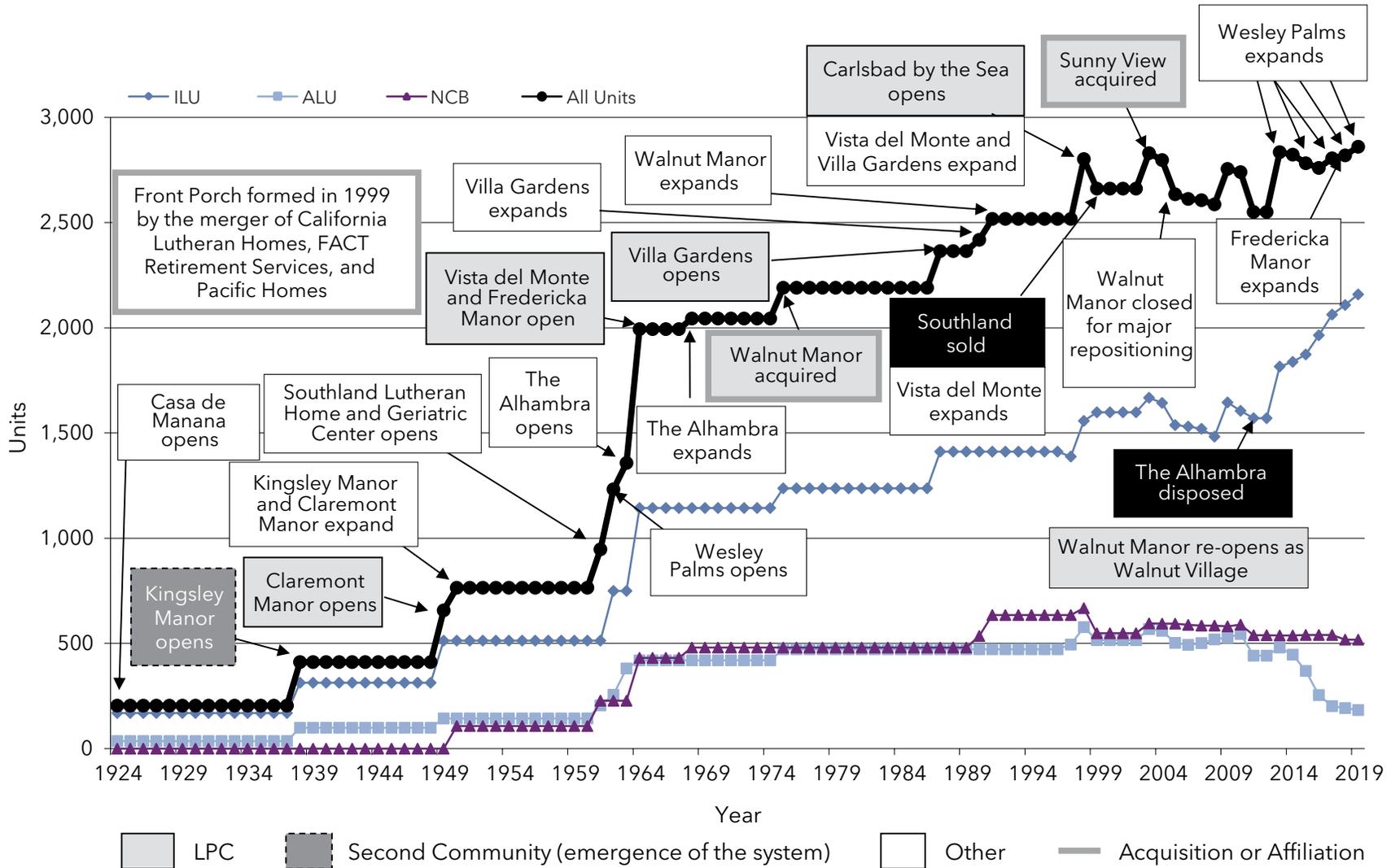
Growth: Pace of Growth

Pacific Retirement Services (OR)



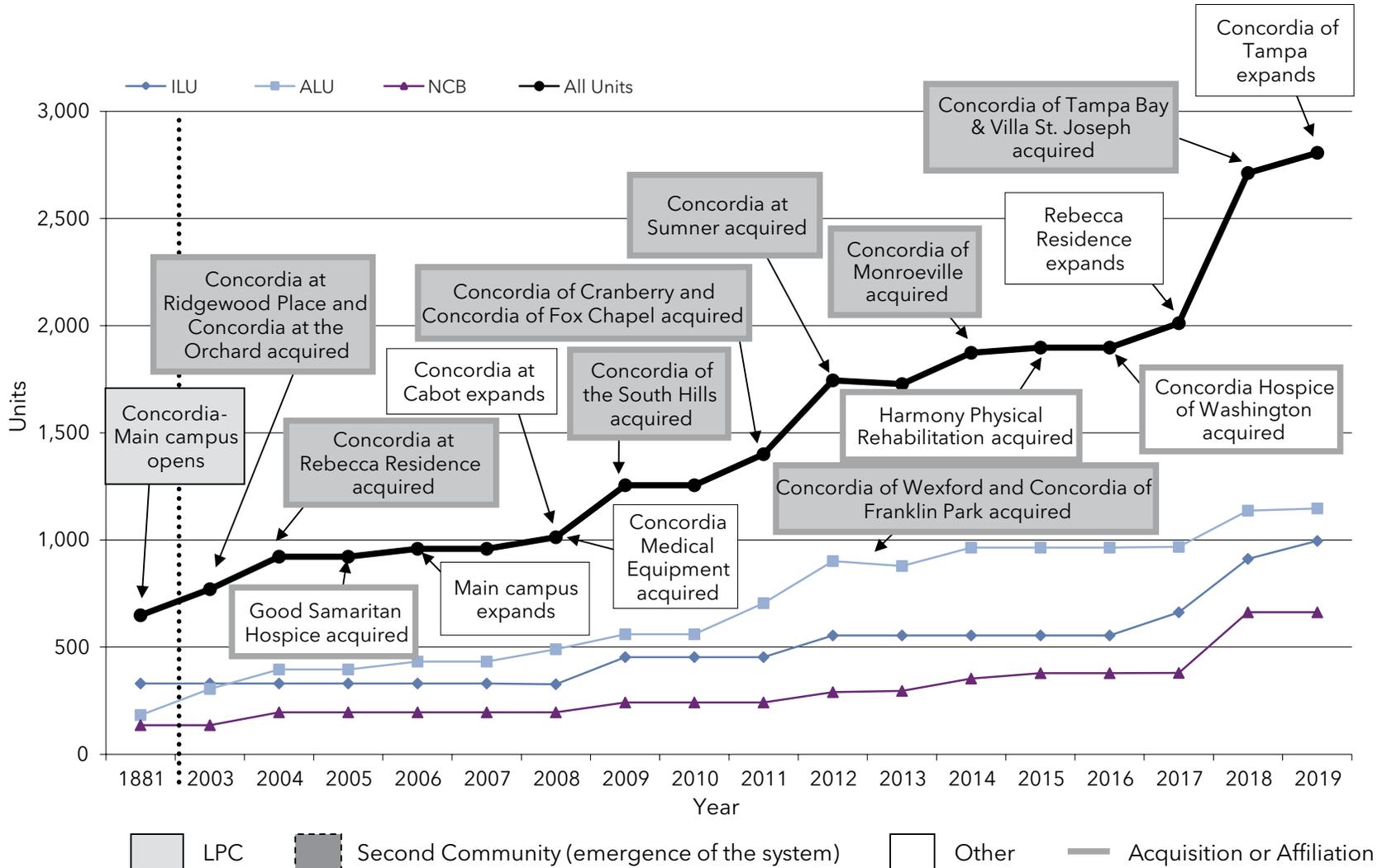
Growth: Pace of Growth

Front Porch Communities and Services (CA)

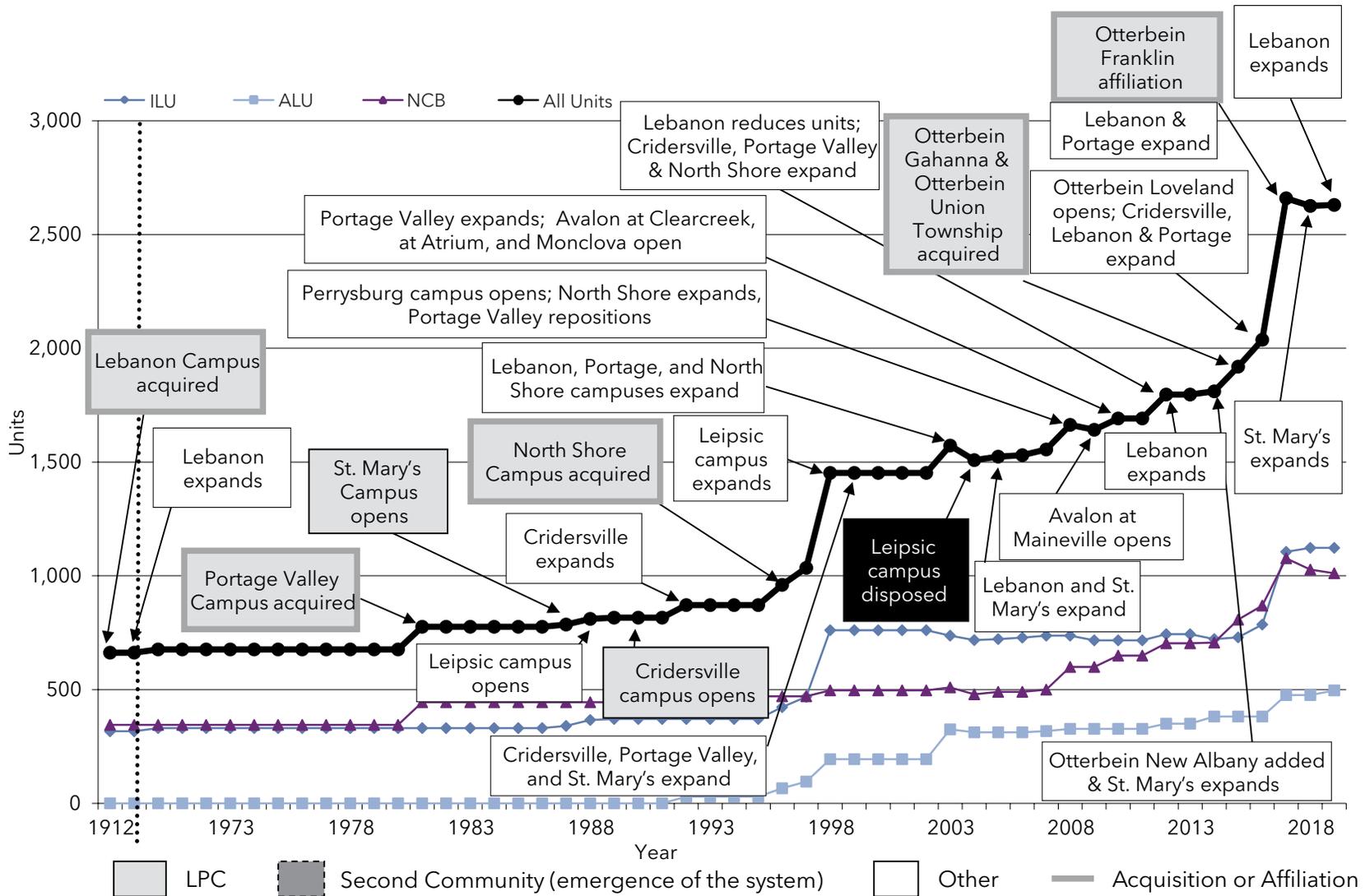


Growth: Pace of Growth

Concordia Lutheran Ministries (PA)

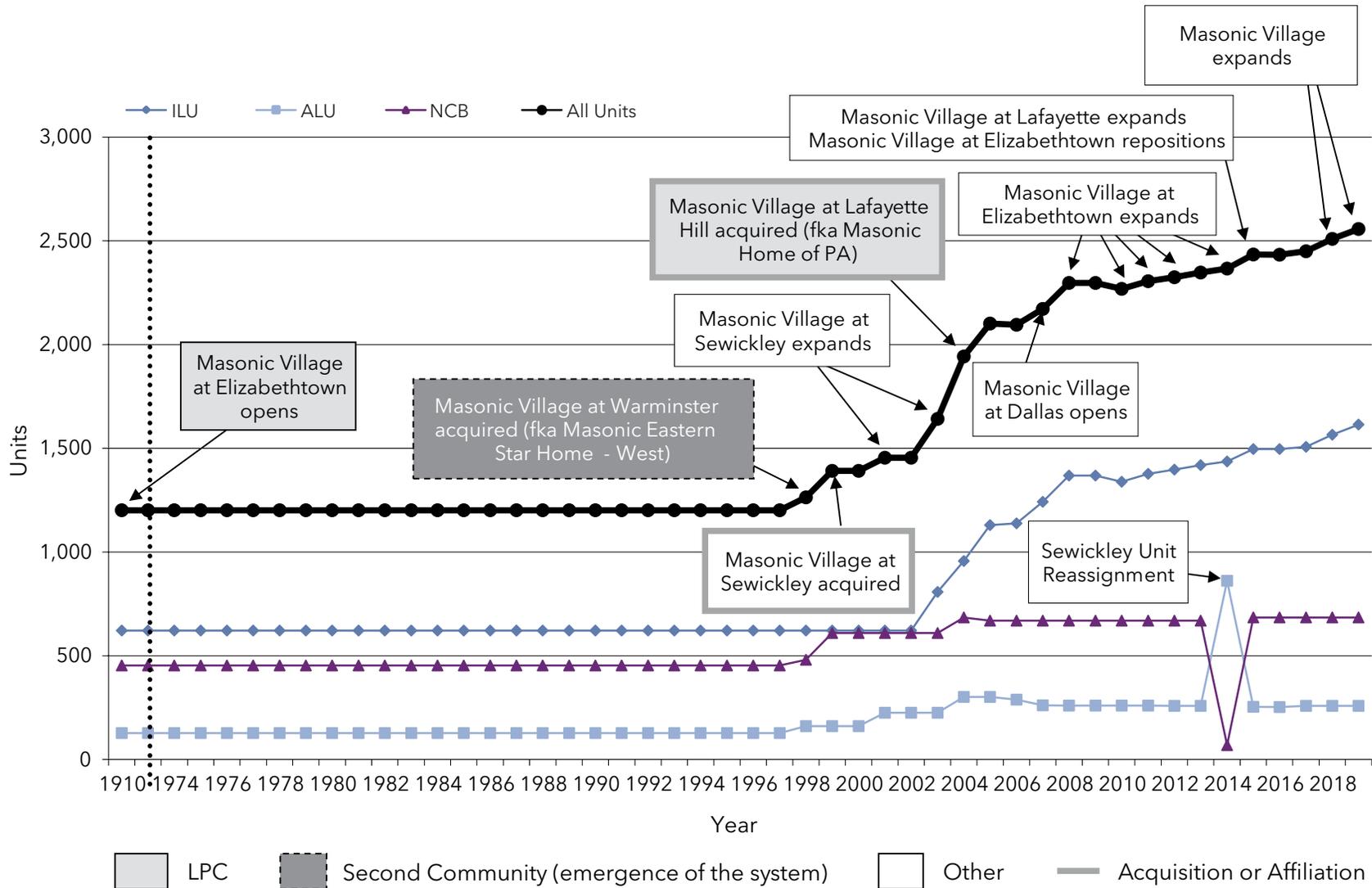


Growth: Pace of Growth Otterbein SeniorLife (OH)

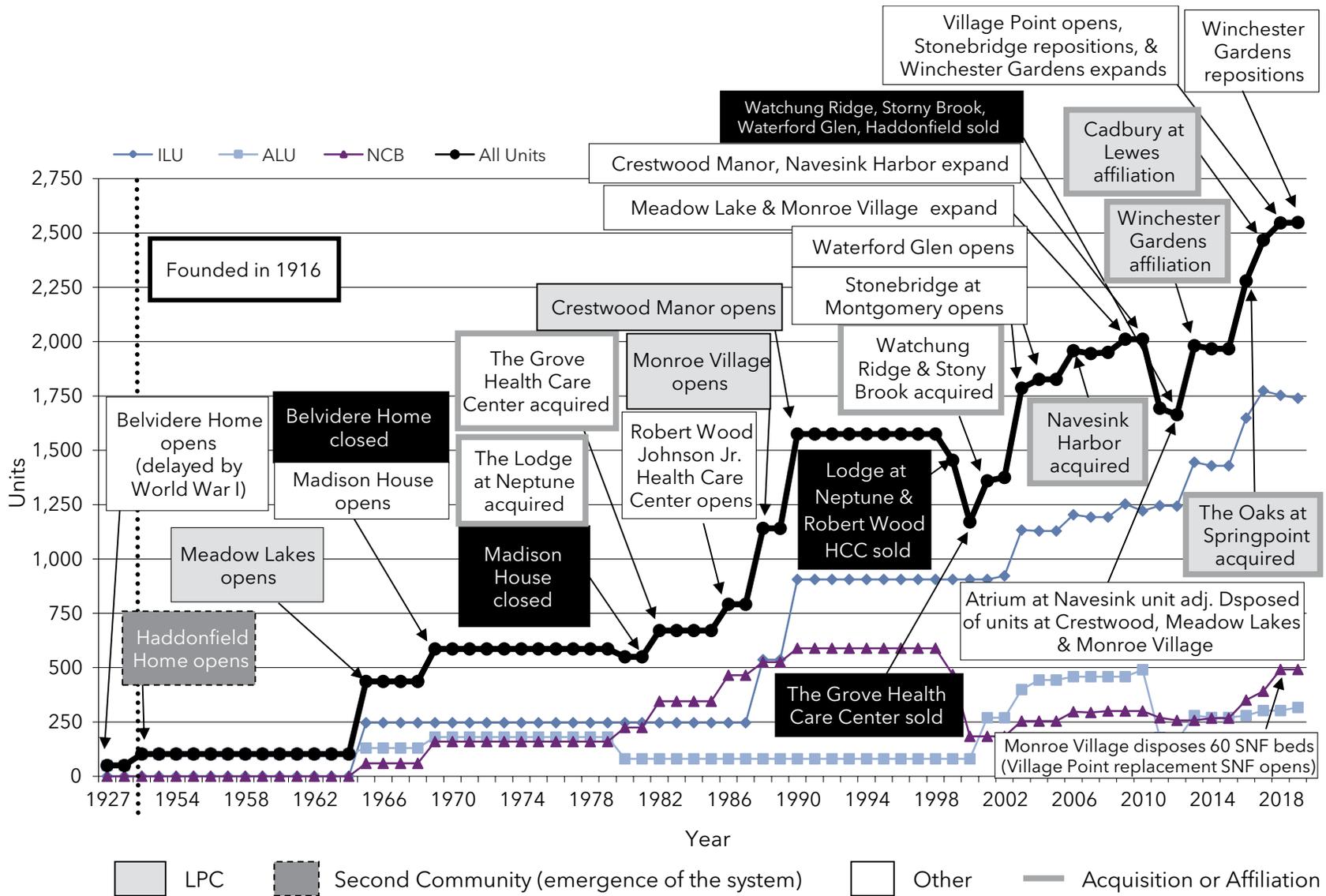


Growth: Pace of Growth

Masonic Villages of the Grand Lodge (PA)



Growth: Pace of Growth Springpoint (NJ)

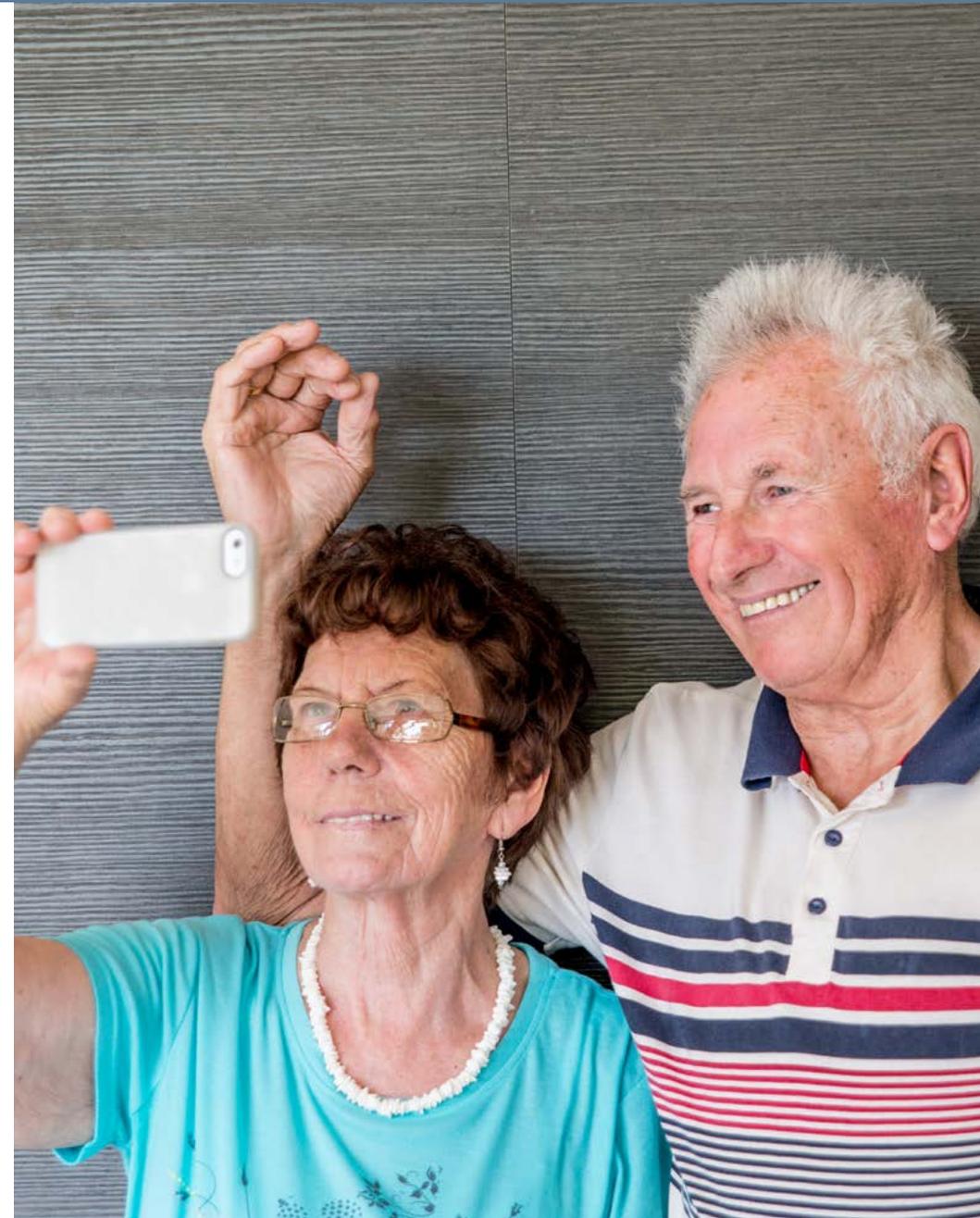


Growth: Aggregate Growth

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 2018 and 2019, 2000 and 2019, and 1990 and 2019 (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

2020 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/19)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2019 (n=200)						
9	Lifespace Communities	IA	54.04%	22.49%	1,165	5,179
74	Ingleside	MD	34.22%	27.30%	308	1,128
49	BHI Senior Living	IN	28.95%	19.58%	297	1,517
59	Methodist Retirement Communities	TX	27.27%	17.33%	228	1,316
41	Buckner Retirement Services	TX	24.33%	17.18%	290	1,688
Growth from 2000 to 2019 (n=178)						
1	National Senior Campuses	MA	697.14%	11.54%	18,293	20,917
140	Smith Senior Living	IL	615.22%	10.91%	566	658
35	Transforming Age	WA	409.09%	8.94%	1,485	1,848
60	SantaFe Senior Living	FL	342.71%	8.14%	1,011	1,306
22	Concordia Lutheran Ministries	PA	332.36%	8.01%	2,157	2,806
Growth from 1990 to 2019 (n=194)						
5	Presbyterian Homes and Services	MN	876.44%	7.77%	5,277	7,958
99	Givens Estates Retirement Community	NC	872.83%	7.76%	576	895
140	Smith Senior Living	IL	777.33%	7.33%	566	1,848
80	Lutheran Homes of South Carolina	SC	691.04%	6.89%	326	1,060
28	Christian Care Companies	AZ	638.15%	6.60%	1,798	2,399

* 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, 19, or 29 years).

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

Growth: Aggregate Growth Organizations by Growth in Units, by Period

2020 Rank	System Name	State	Growth*		Total Units (as of 12/31/19)
			Units Added	Average Annual Growth (%)	
Growth in 2019 (n=200)					
9	Lifespace Communities	IA	1,165	54.04%	5,179
3	Acts Retirement Services, Inc.	PA	966	20.73%	9,592
7	HumanGood	CA	760	22.01%	5,474
4	Ascension Senior Living	IL	407	5.01%	8,129
1	National Senior Campuses	MA	404	1.93%	20,917
Growth from 2000 to 2019 (n=178)					
1	National Senior Campuses	MA	18,293	697.14%	20,917
5	Presbyterian Homes and Services	MN	5,277	196.83%	7,958
2	The Evangelical Lutheran Good Samaritan Society	SD	4,700	43.49%	15,507
3	Acts Retirement-Life Communities	PA	3,843	66.85%	9,592
7	HumanGood	MO	2,788	103.80%	5,474
Growth from 1990 to 2019 (n=194)					
1	National Senior Campuses	MA	n/a**	n/a**	20,917
5	Presbyterian Homes and Services	MN	7,143	876.44%	7,958
2	The Evangelical Lutheran Good Samaritan Society	SD	5,722	58.48%	15,507
3	Acts Retirement-Life Communities	PA	4,661	94.52%	9,592
7	HumanGood	CA	3,453	170.86%	5,474

* 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, 19, or 29 years).

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

Growth: Aggregate Growth

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

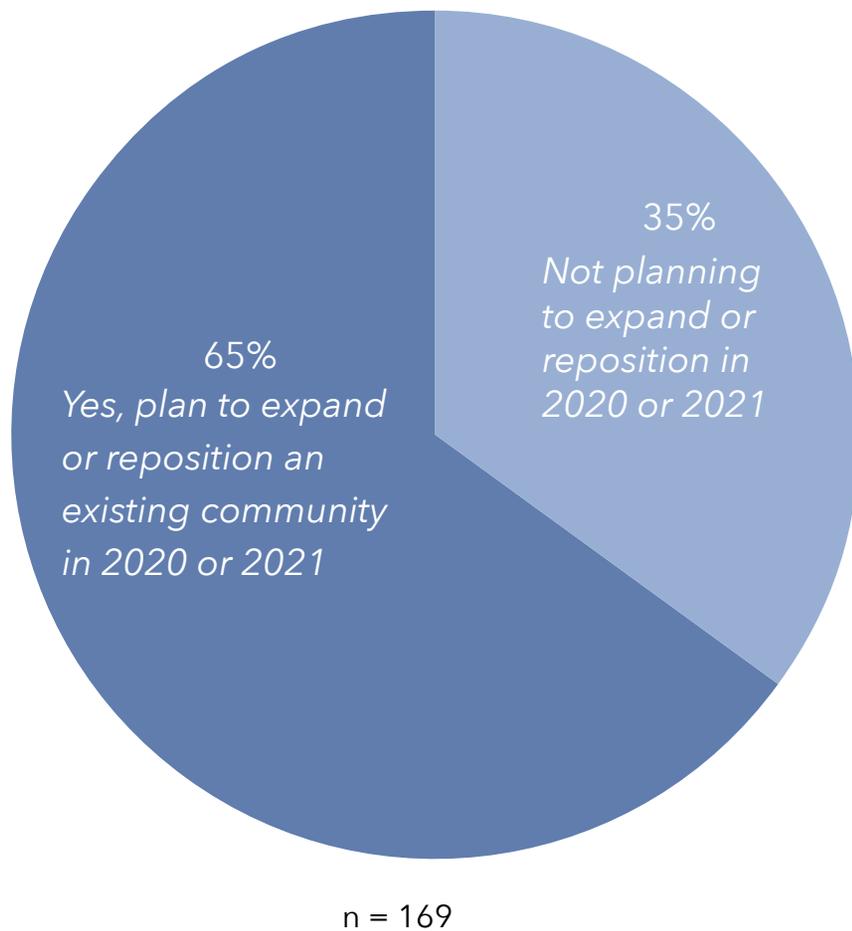
2020 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/19)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2019 (n=33)						
9	Lifespace Communities	IA	54.04%	22.49%	1,165	5,179
7	HumanGood	CA	22.01%	13.88%	760	5,474
3	Acts Retirement Services, Inc.	PA	20.73%	10.07%	966	9,592
8	Covenant Living Communities and Services	IL	16.96%	6.25%	327	5,228
16	Asbury Communities	MD	8.76%	6.63%	238	3,591
Growth from 2000 to 2019 (n=33)						
1	National Senior Campuses	MA	697.14%	11.54%	18,293	20,917
5	Presbyterian Homes and Services	MN	196.83%	5.89%	5,277	7,958
7	HumanGood	CA	103.80%	3.82%	2,788	5,474
3	Acts Retirement Services, Inc.	PA	66.85%	2.73%	3,843	9,592
2	Evangelical Lutheran Good Samaritan Society	SD	43.49%	1.92%	4,700	15,507
Growth from 1990 to 2019 (n=33)						
1	National Senior Campuses	MA	n/a**	n/a**	20,917	20,917
5	Presbyterian Homes and Services	MN	876.44%	10.83%	7,143	7,958
11	Westminster Communities of Florida	FL	250.93%	7.74%	2,971	4,155
7	HumanGood	CA	170.86%	9.07%	3,453	5,474
3	Acts Retirement Services, Inc.	PA	94.52%	9.51%	4,661	9,592

* 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, 19, or 29 years).

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

Growth: Future Growth Plans

Percentage Planning to Expand or Reposition in Next Two Years



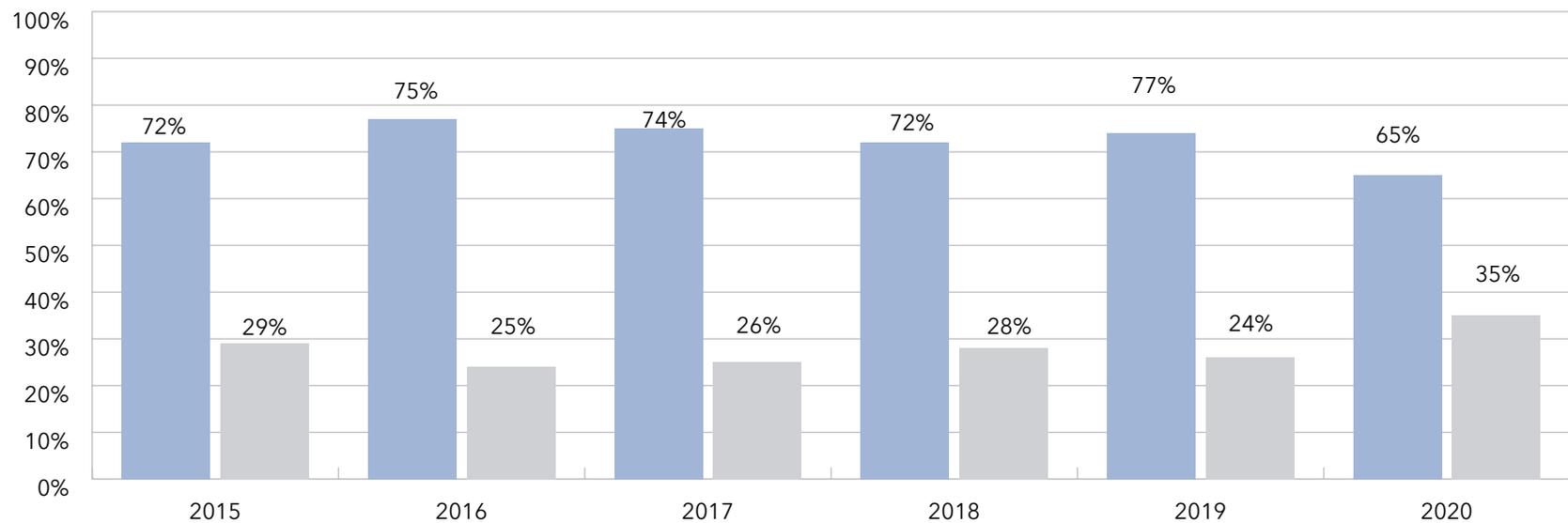
Future Growth Plans

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 65% of the LZ 200 reported intentions to expand or reposition an existing campus in 2020 or 2021. Roughly 26% reported that they intend to grow via the construction of new communities while 28% responded 'maybe' to this type of growth in 2020 or 2021. Another 10% reported that they intend to grow from affiliation while 33% may consider affiliation in 2020 or 2021.

Growth: Future Growth Plans

Percentage Planned Expansions or Repositions Since 2015



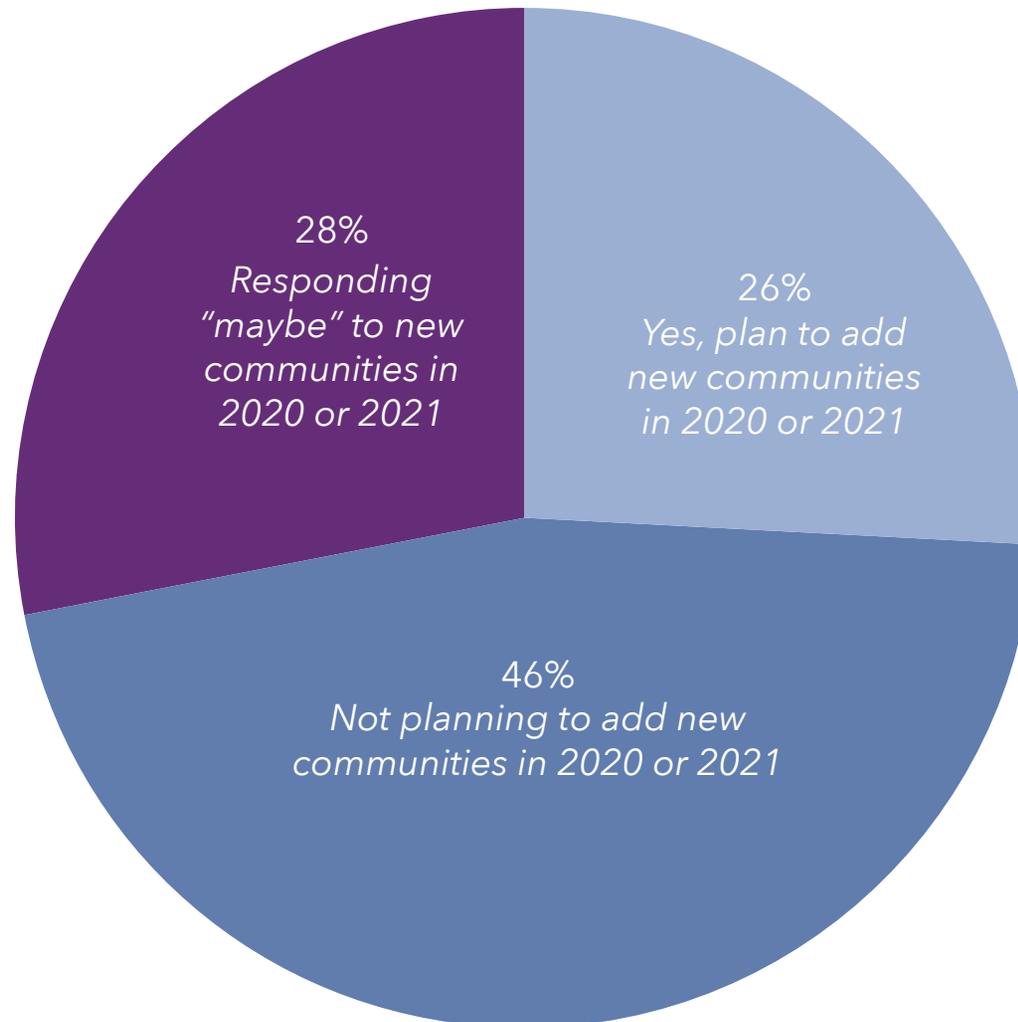
KEY: ■ Yes, plan to expand or reposition an existing community

■ Not planning to expand or reposition

n = 169

Growth: Future Growth Plans

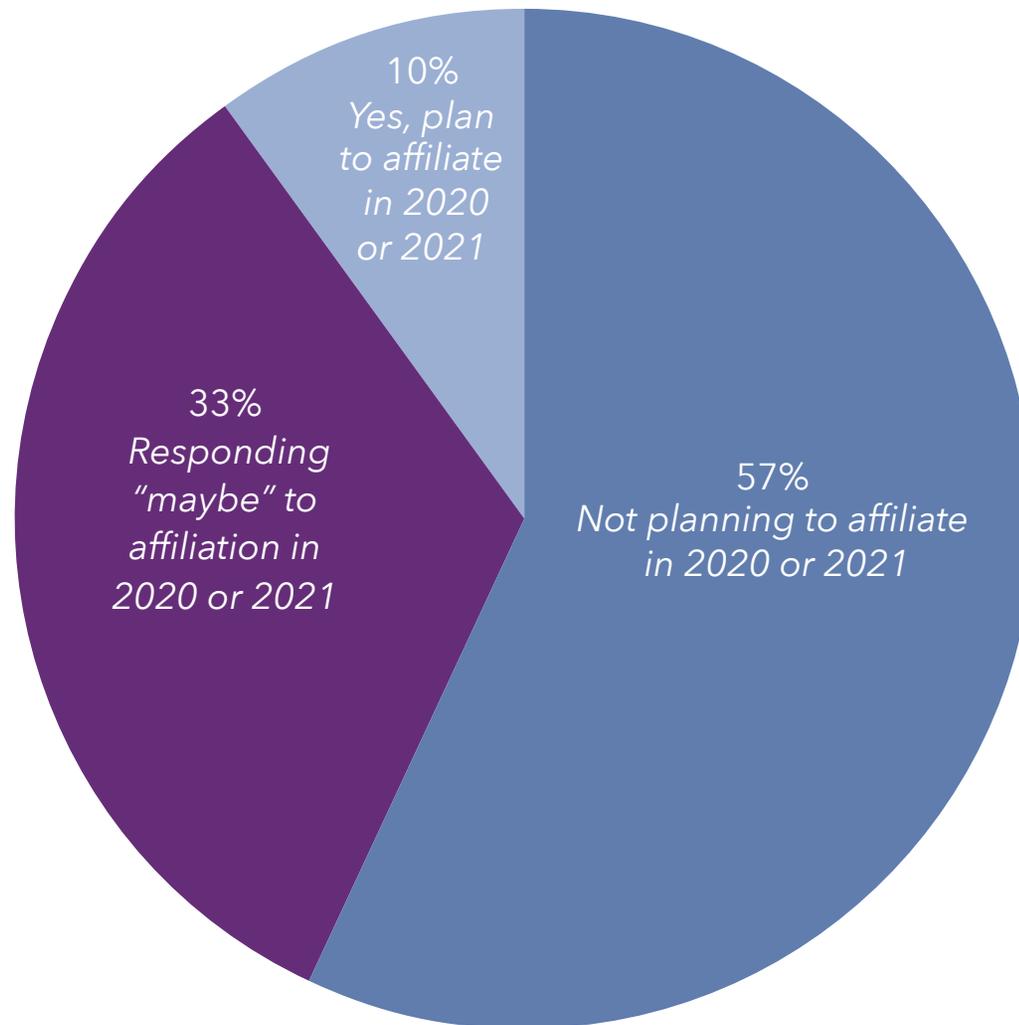
Percentage Planning to Add A New Community Through Development or Affiliation



N= 163

Growth: Future Growth Plans

Percentage Planning to Grow Through Affiliation



N= 141

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, 25, 50, 100, 150 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 (1980-2019). More than 1,300 communities have been added from campus expansion since 1980 (Chart 5-6a). Dispositions have also increased dramatically. Of the 227 community dispositions that occurred from 1980-2019 among the LZ 200 (Chart 5-6a), roughly 227 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

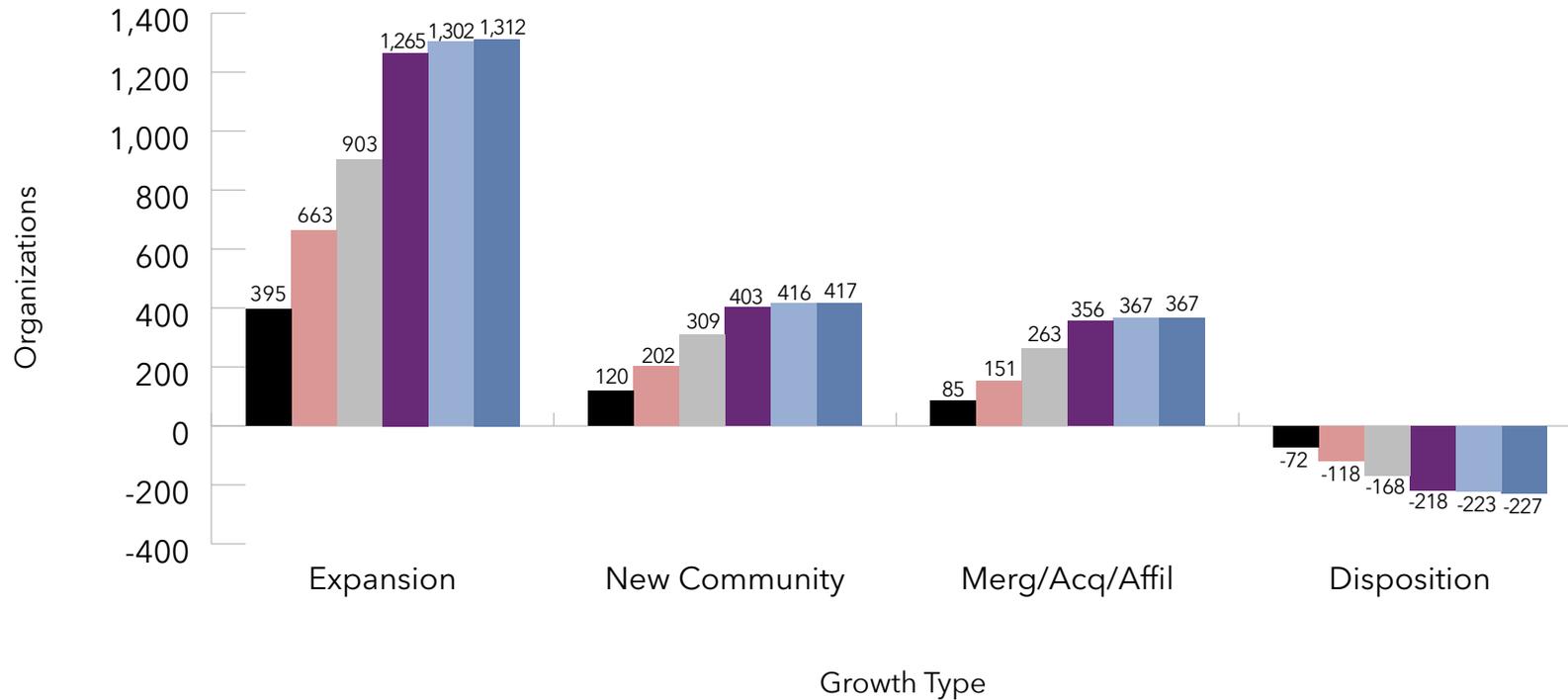
Growth: Type of Growth by Organizations

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



Growth: Type of Growth by Organizations

Number of Organizations Changing, by Growth Type, 1980 through 2019



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, 1990 through 2019



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.

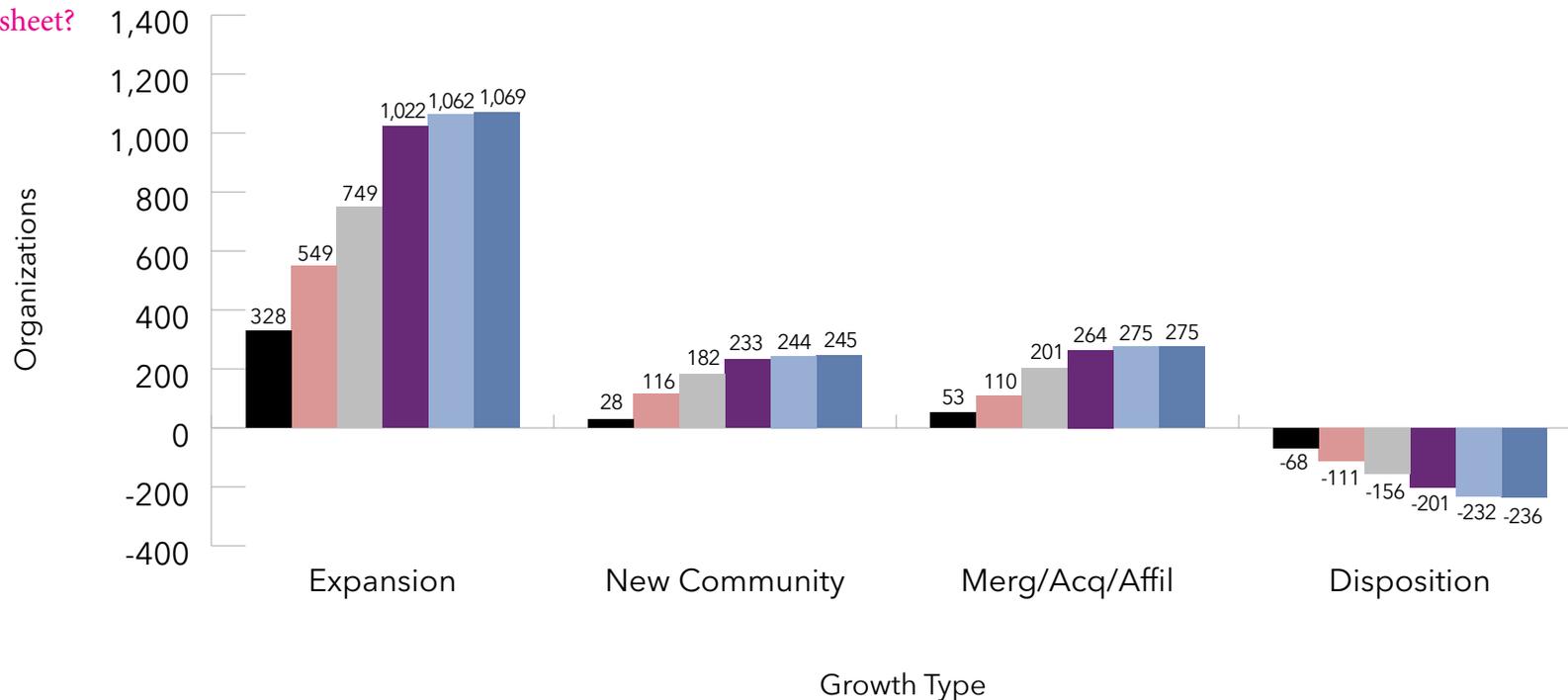
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

Disposition: The sale or closure of a community.

Growth: Type of Growth by Organizations

Number of Organizations Changing, by Growth Type, 2000 through 2019

change x axis to 1,200 per spreadsheet?



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.

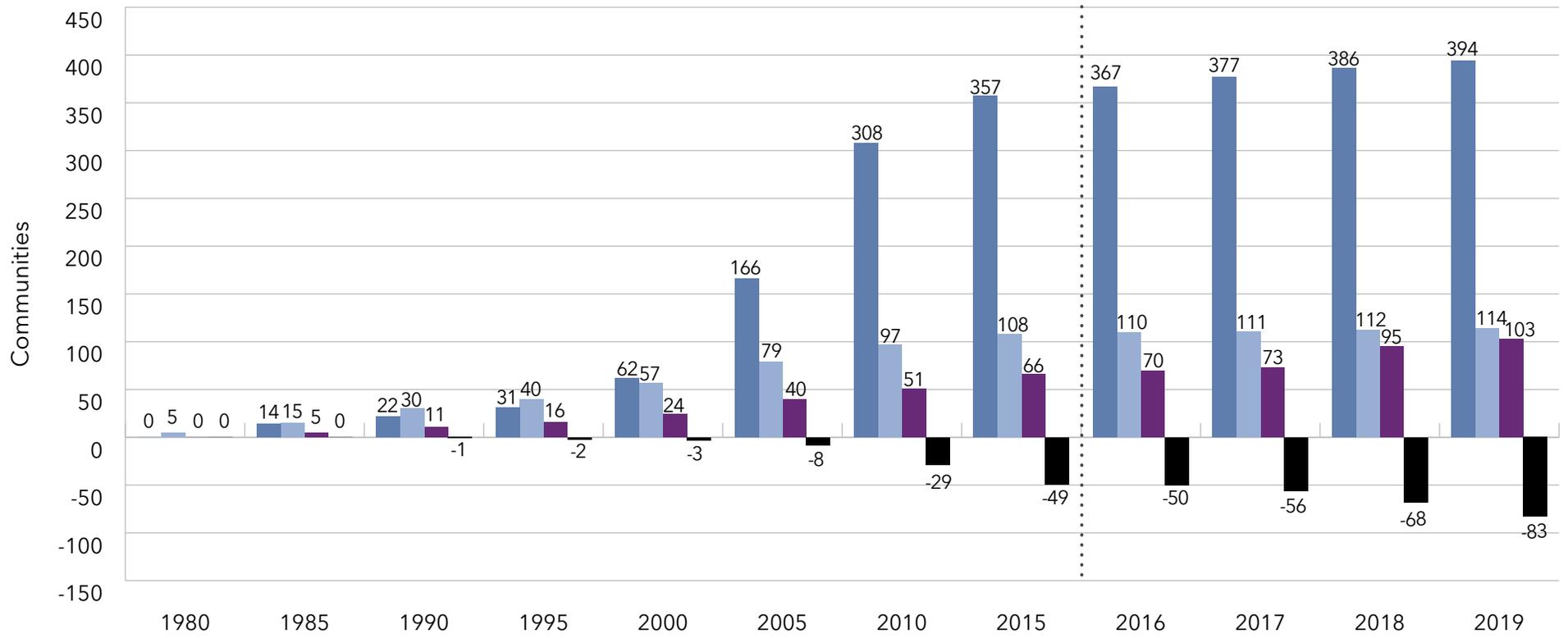
New Community: Growth by the addition of units through construction of a new location.

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 Communities

Cumulative Growth of Largest 10 Systems



KEY:

- Expansion
- New Community
- Merger/Aquisition/Affiliation
- Disposition

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.

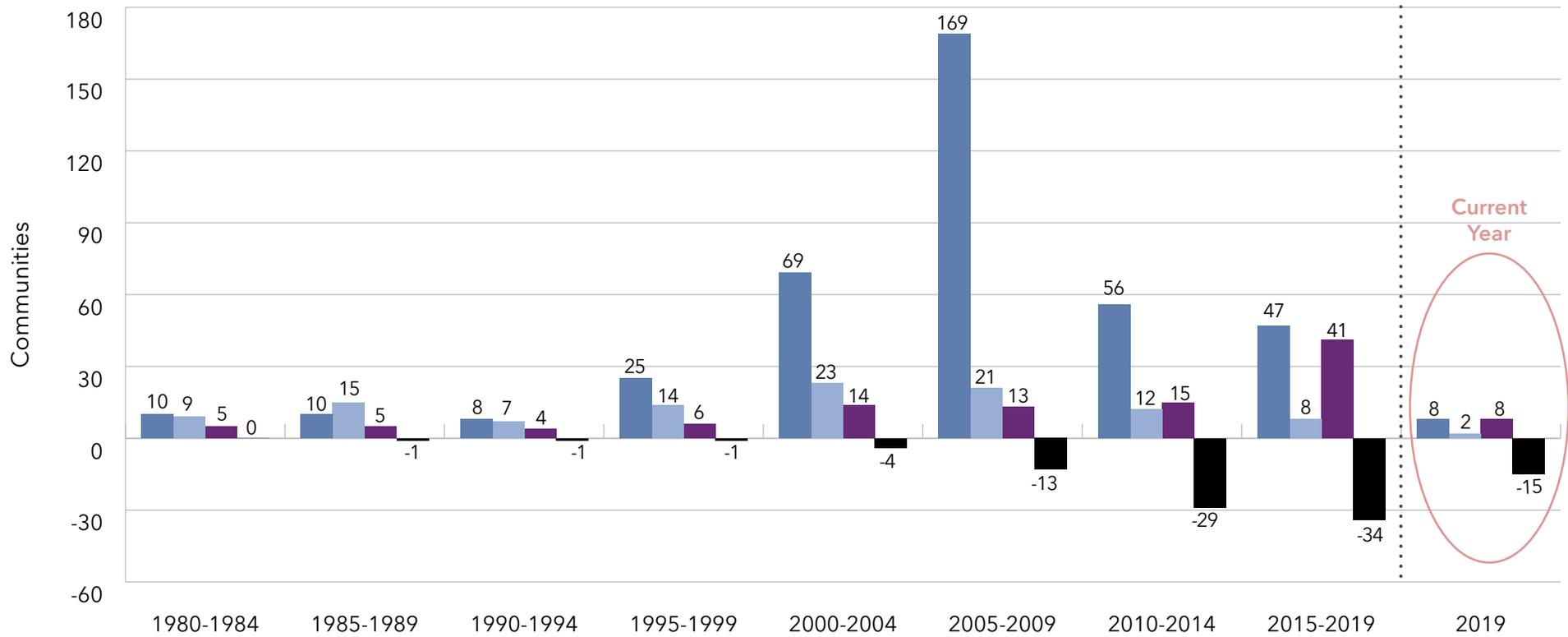
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

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

Growth: Type of Growth by Communities

Incremental Growth of Largest 10 Systems



KEY: Expansion (dark blue), New Community (light blue), Merger/Aquisition/Affiliation (purple), Disposition (black)

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.

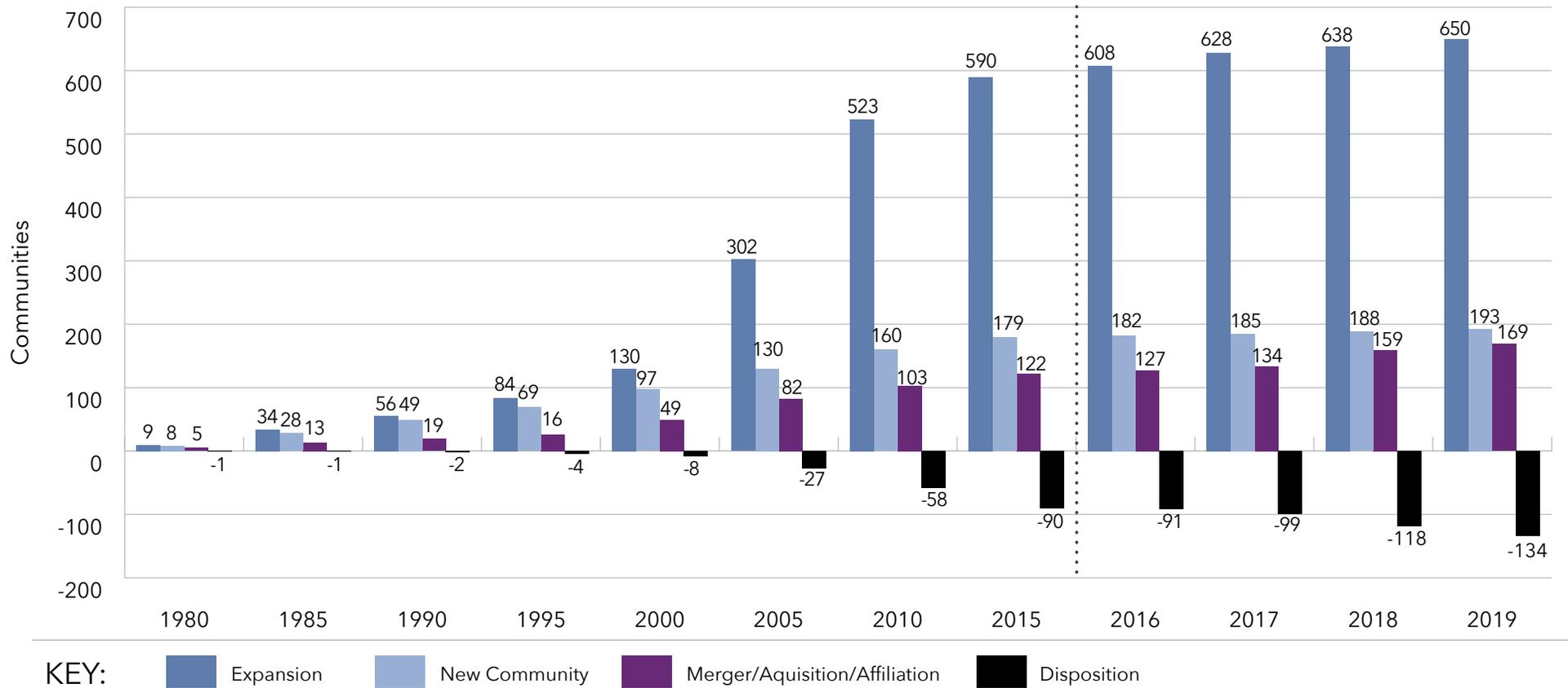
New Community: Growth by the addition of units through construction of a new location.

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

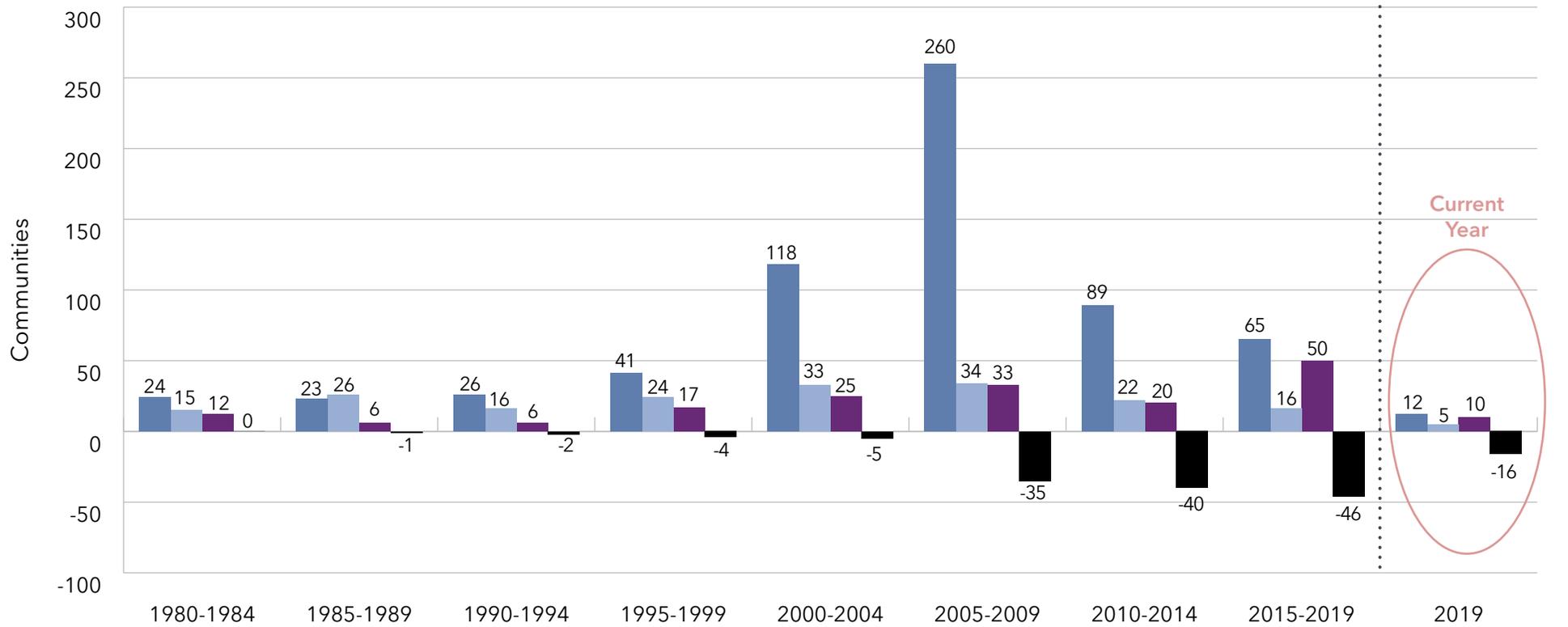
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Incremental Growth of Largest 25 Systems



KEY: Expansion (dark blue), New Community (light blue), Merger/Aquisition/Affiliation (purple), Disposition (black)

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.

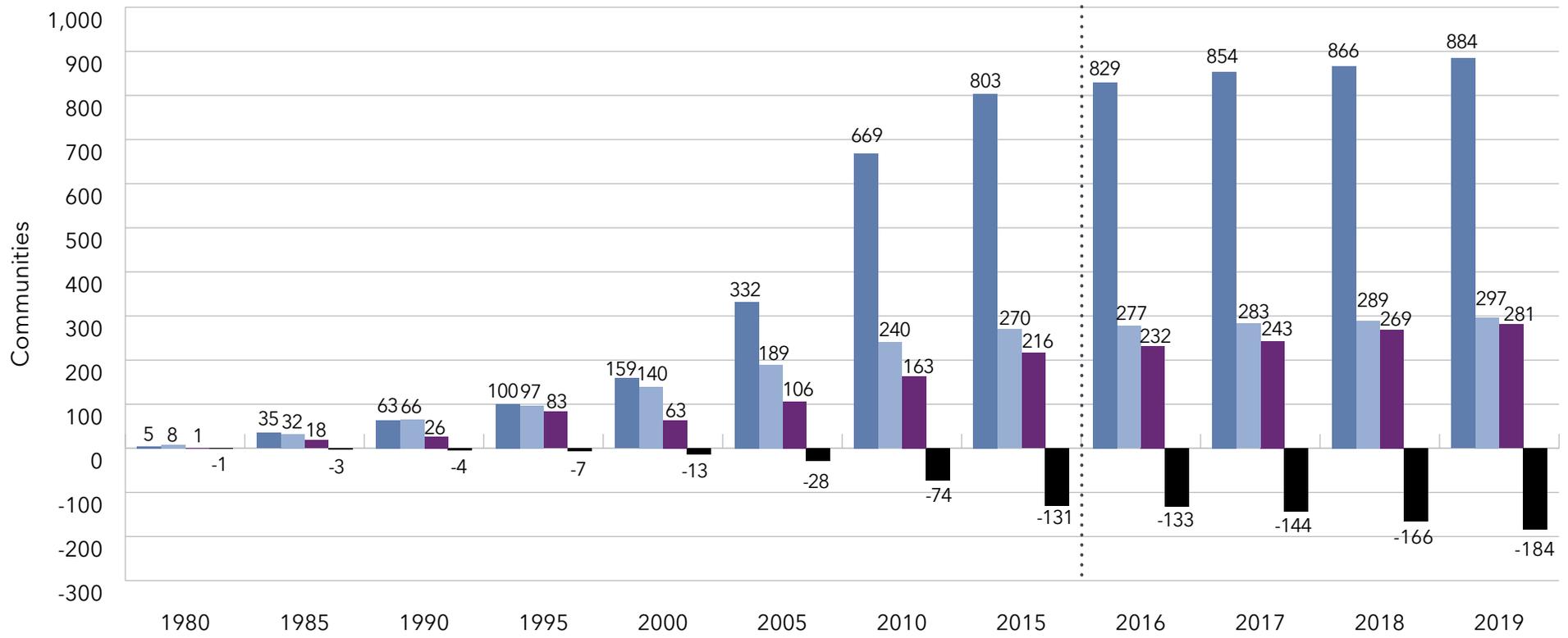
New Community: Growth by the addition of units through construction of a new location.

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



KEY:

- Expansion
- New Community
- Merger/Aquisition/Affiliation
- Disposition

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.

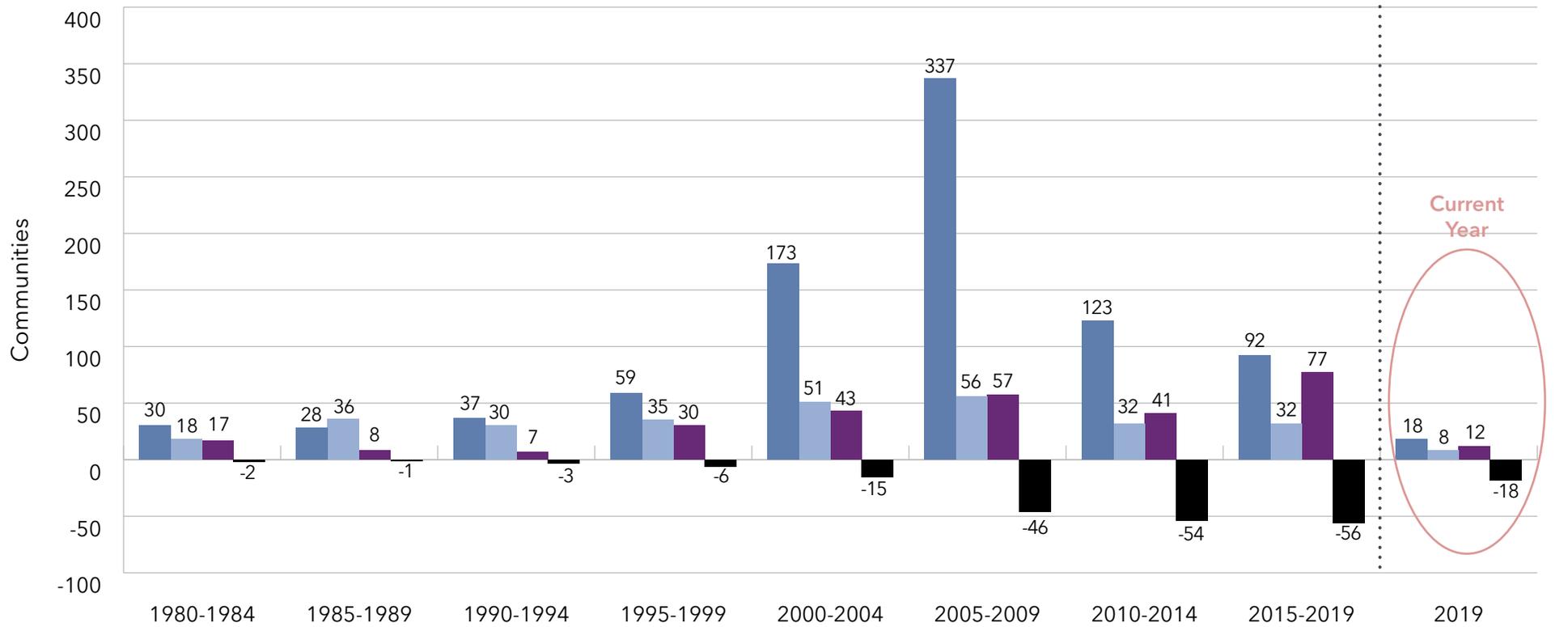
New Community: Growth by the addition of units through construction of a new location.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Incremental Growth of Largest 50 Systems



KEY: Expansion (dark blue), New Community (light blue), Merger/Aquisition/Affiliation (purple), Disposition (black)

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.

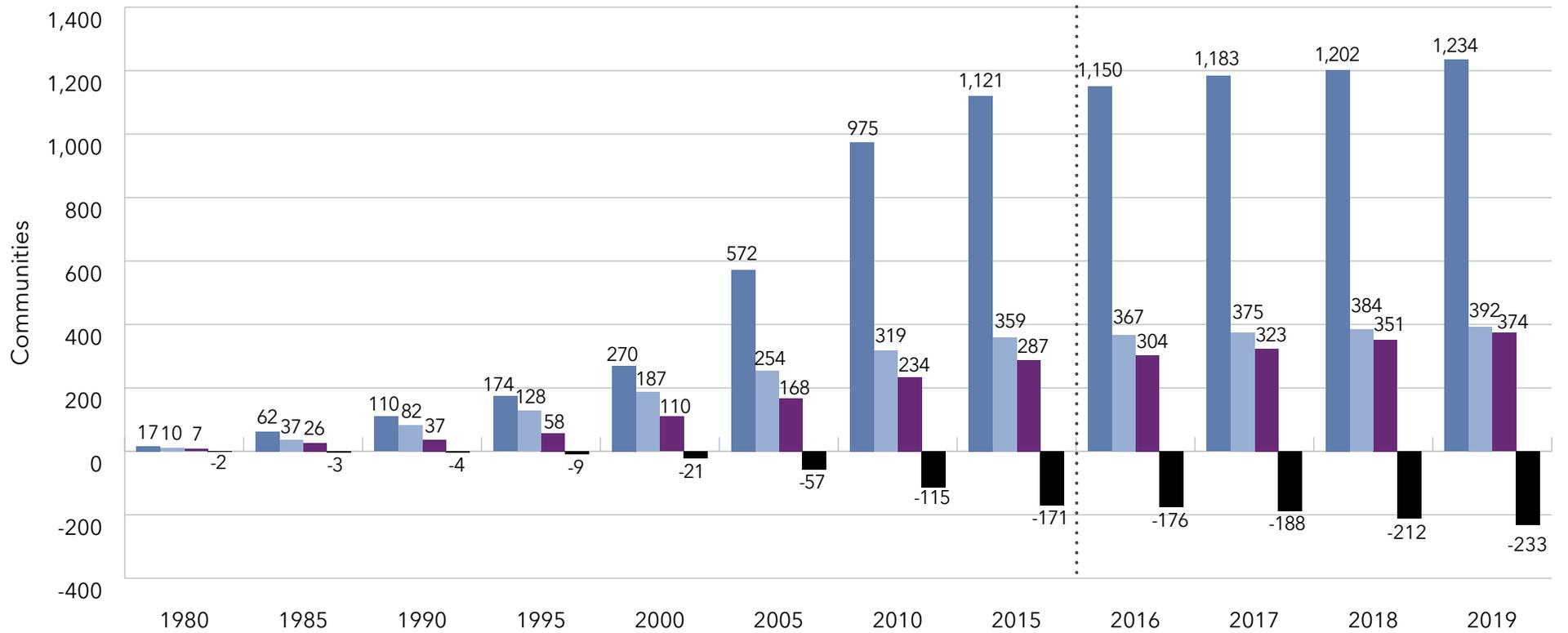
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

Disposition: The sale or closure of a community.

Growth: Type of Growth by Communities

Cumulative Growth of Largest 100 Systems



KEY:

- Expansion
- New Community
- Merger/Aquisition/Affiliation
- Disposition

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.

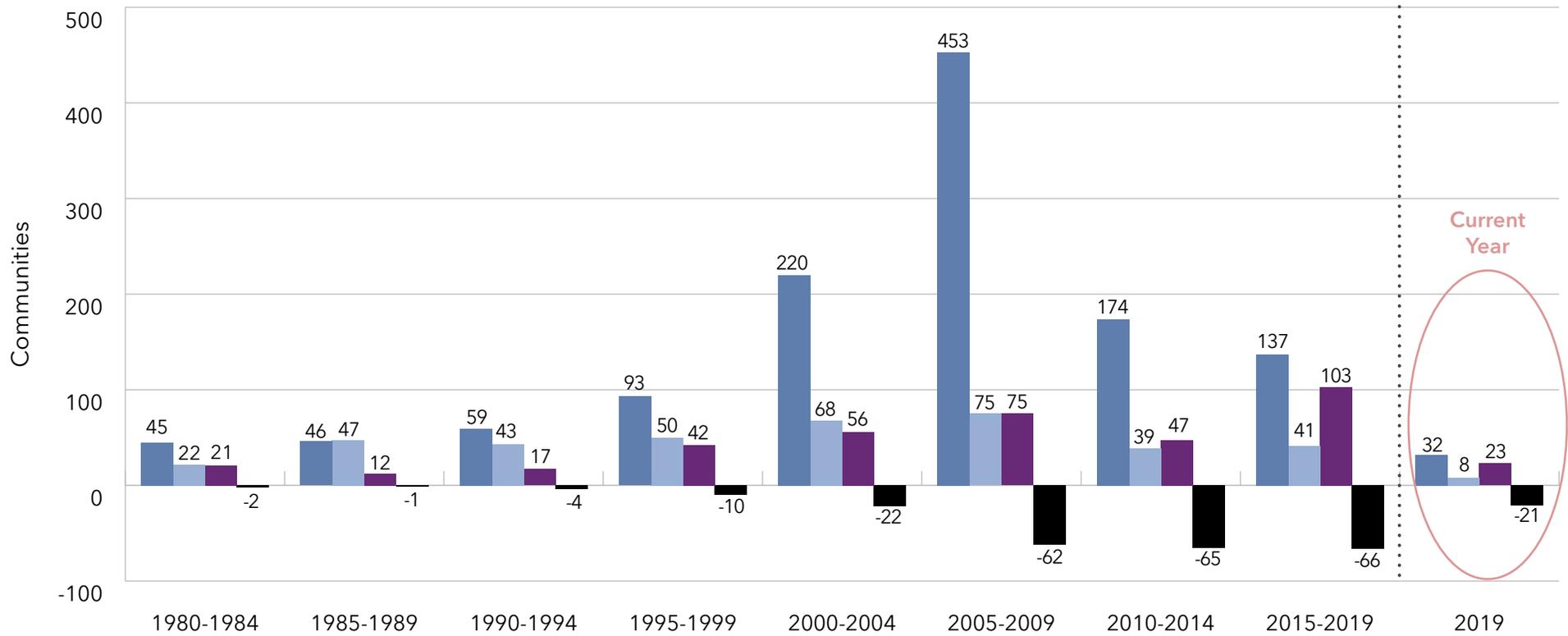
New Community: Growth by the addition of units through construction of a new location.

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

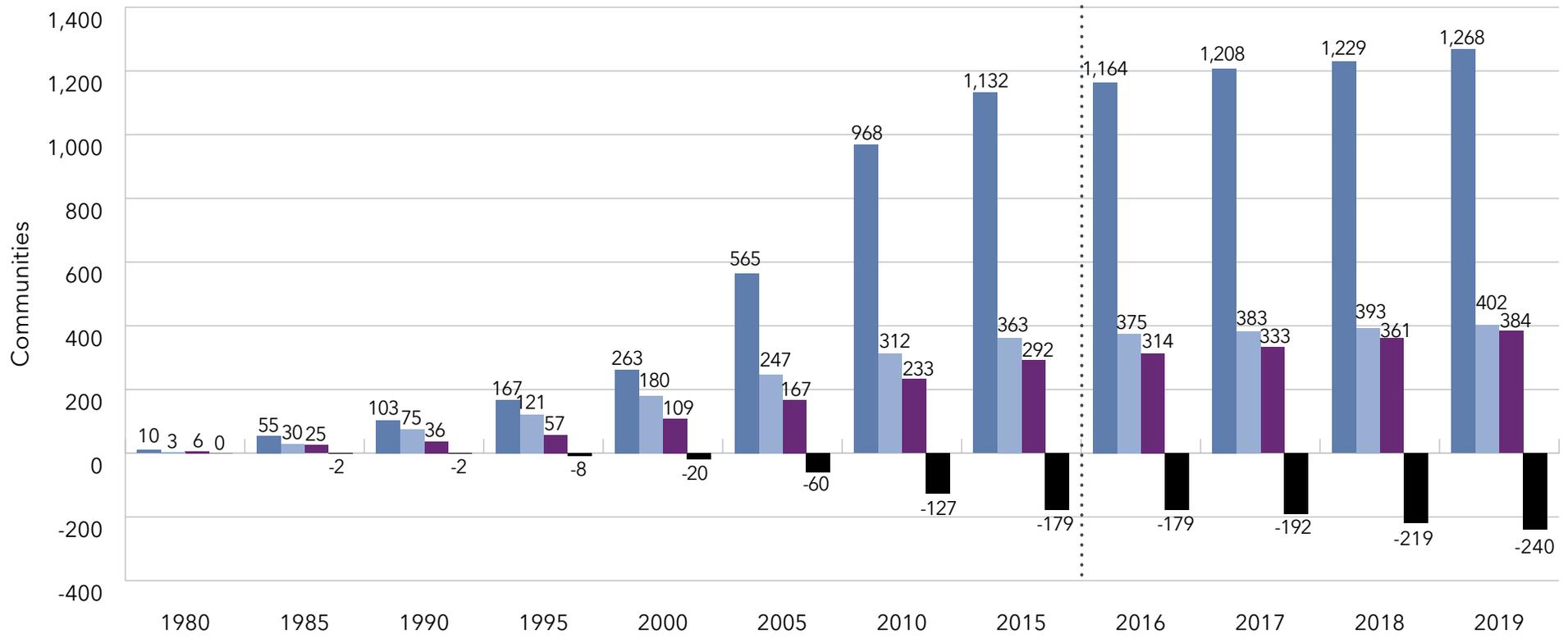
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

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

Growth: Type of Growth of Communities

Cumulative 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.

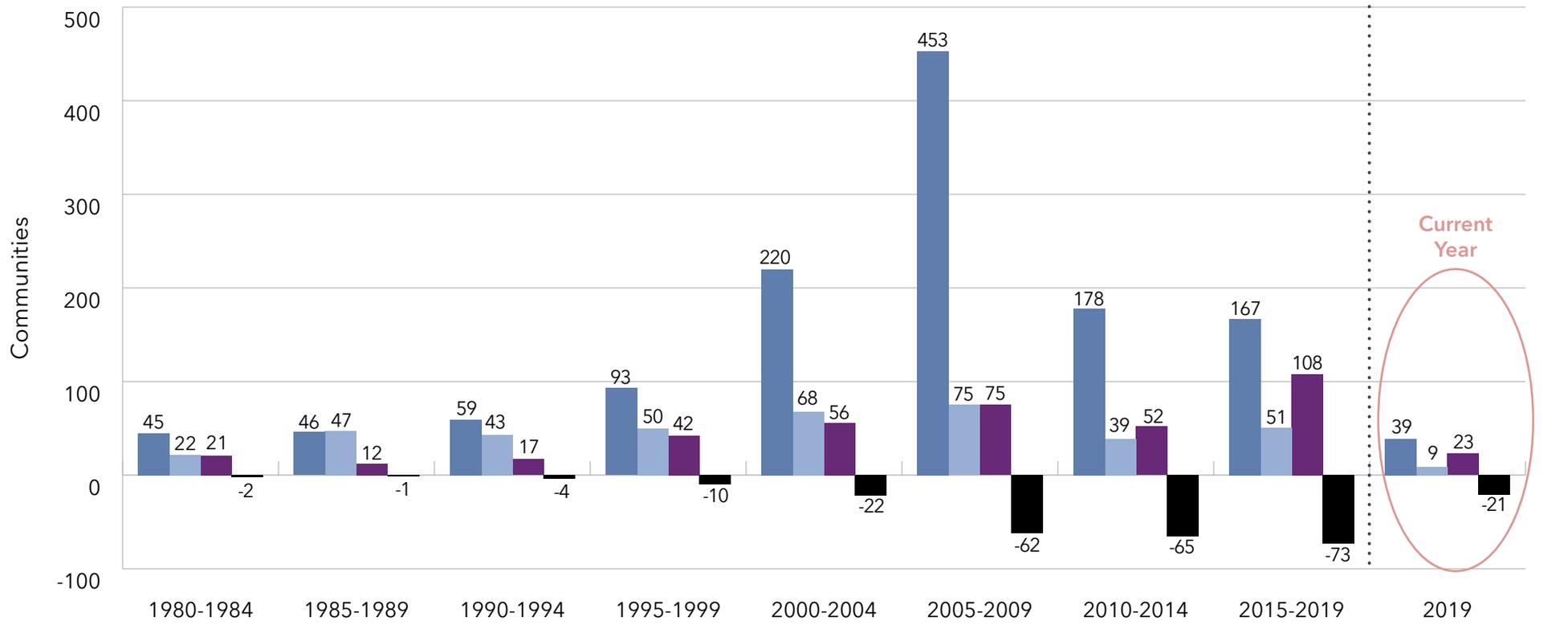
Note: Expansion to largest 150 made in 2015

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.

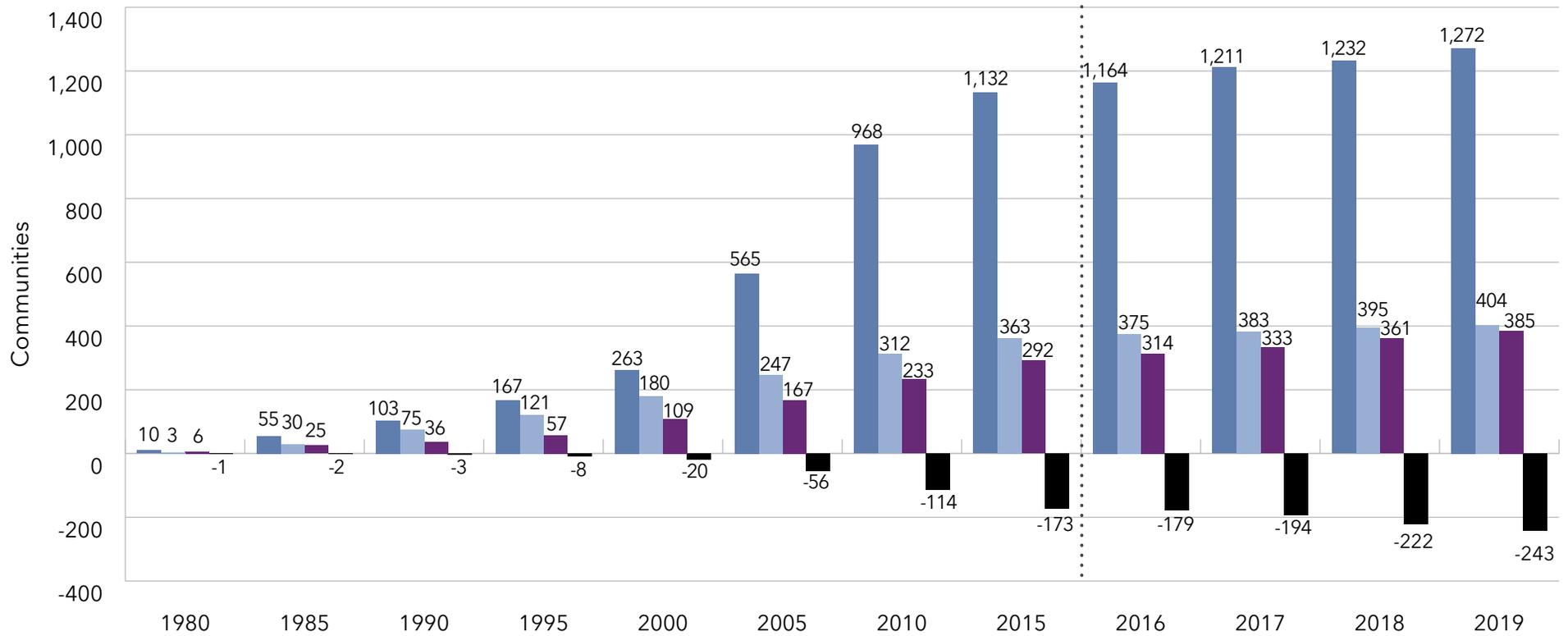
Note: Expansion to largest 150 made in 2015

Merger/Aquisition/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.

Growth: Type of Growth by Communities

Cumulative Growth Of Largest 200 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.

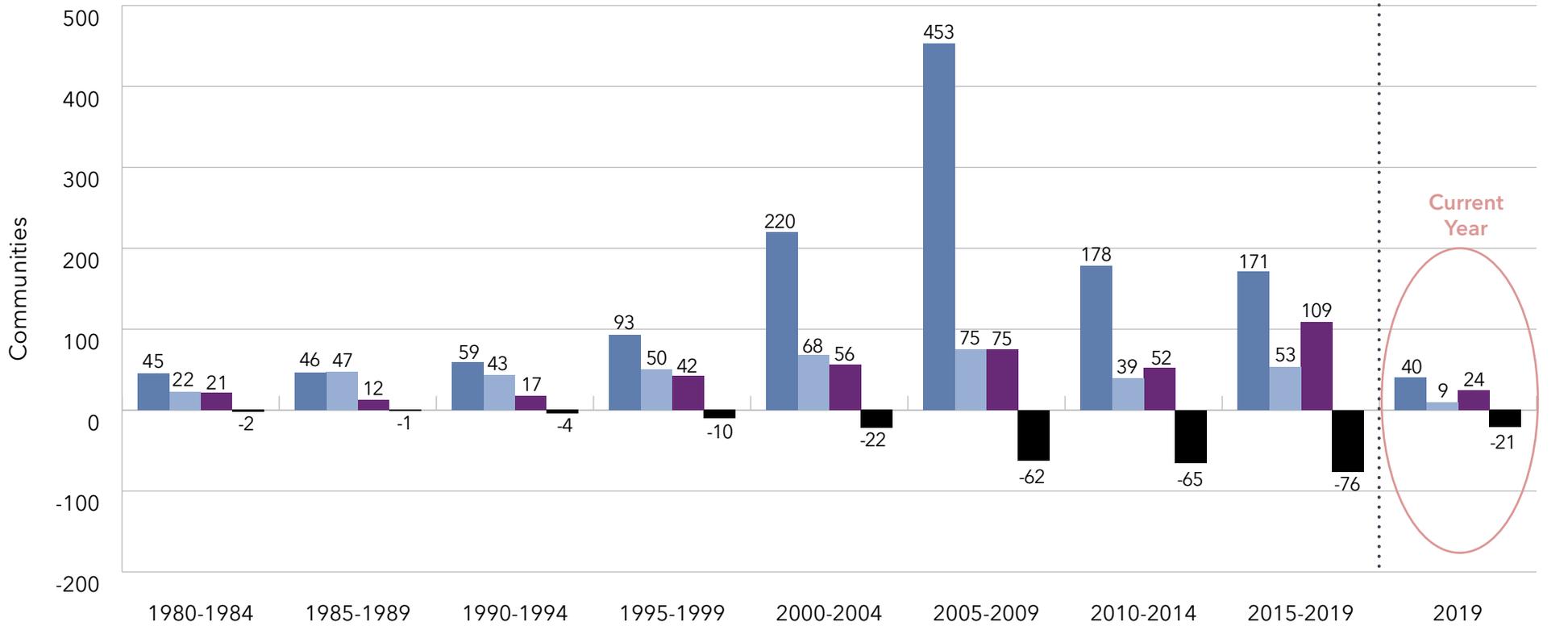
Note: Expansion to largest 150 made in 2015

Merger/Aquisition/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.

Growth: Type of Growth by Communities

Incremental Growth Of Largest 200 Systems



KEY:

- Expansion
- New Community
- Merger/Aquisition/Affiliation
- Disposition

Expansion: The addition of new units to an existing community.
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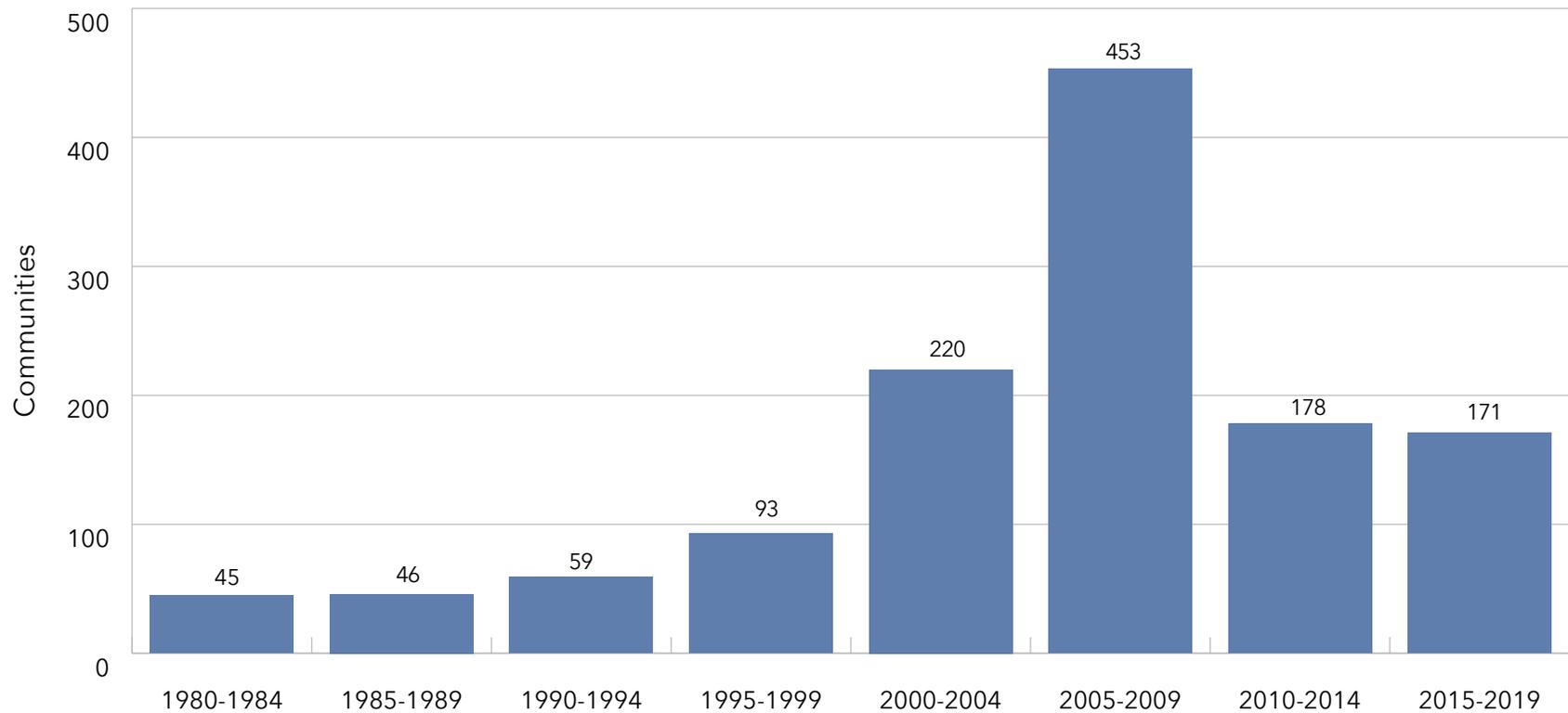
Note: Expansion to largest 150 made in 2015

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



KEY: ■ Expansion

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

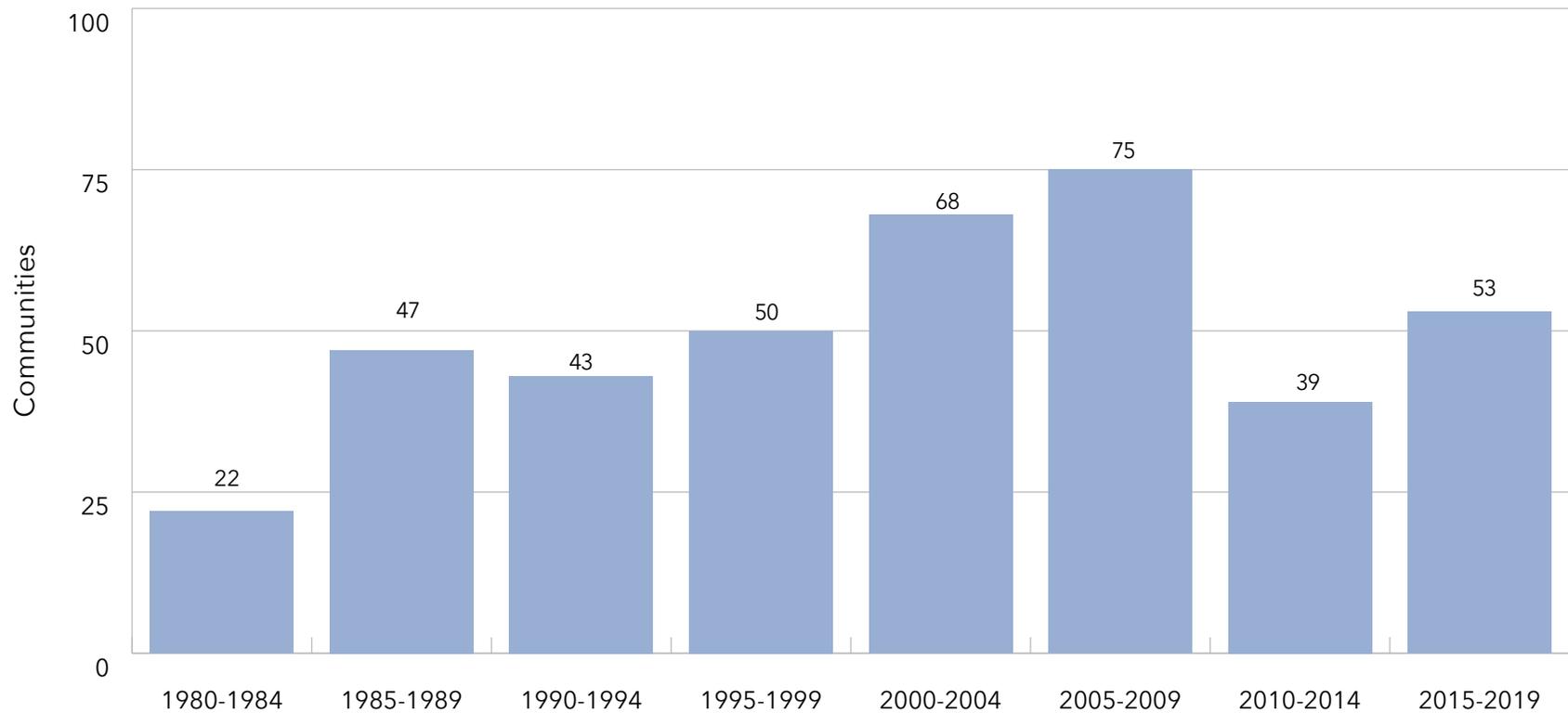
2019 Community Expansions

2019 Rank	System Name	Community	City	State	Community Type
1	National Senior Campuses	Ashby Ponds	Loudoun	VA	LPC
1	National Senior Campuses	Wind Crest	Highlands Ranch	CO	LPC
1	National Senior Campuses	Ann's Choice	Warminster	PA	LPC
3	ACTS Retirement Services, Inc.	Azalea Trace	Pensacola	FL	LPC
9	Lifespace Communities Inc.	Friendship Village of South Hills	Upper St. Clair	PA	LPC
21	Front Porch Communities and Services	Wesley Palms	San Diego	CA	IL
22	Concordia Lutheran Ministries	Concordia Village of Tampa	Tampa	FL	LPC
23	Otterbein SeniorLife	Otterbein Lebanon	Lebanon	OH	LPC
24	Masonic Villages of the Grand Lodge of Pennsylvania	Masonic Village at Elizabethtown	Elizabethtown	PA	IL
32	Ecumen	Ecumen Pathstone	Mankator	MN	LPC
49	BHI Senior Living Inc	Hoosier Village	Zionsville	IN	LPC
55	Providence Life Services	Park Place of St. John	St. John	IN	IL
63	LifeSpire of Virginia	The Lakewood	Richmond	VA	LPC
63	LifeSpire of Virginia	The Glebe	Daleville	VA	LPC
74	Ingleside	Ingleside at Rock Creek	Washington	DC	LPC
74	Ingleside	Ingleside at King Farm	Rockville	MD	LPC
78	United Methodist Homes	Brooks Estates	Pittston	PA	IL
81	The Presbyterian Homes, Inc.	River Landing at Sandy Ridge	High Point	NC	LPC
87	The United Methodist Retirement Homes, Inc.	Croasdaile Village	Durham	NC	LPC
110	Landis Communities	Landis Homes	Lititz	PA	LPC
140	Smith Senior Living	Smith Crossing	Orland Park	IL	LPC
142	Baptist Homes Society	Providence Point	Pittsburgh	PA	LPC

Note: Due to the high volume of expansions in 2019, the cut off was less than 20 total units. There were an additional 18 expansions in 2019.

Growth: New Communities

Historical Growth



KEY:  New Community

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

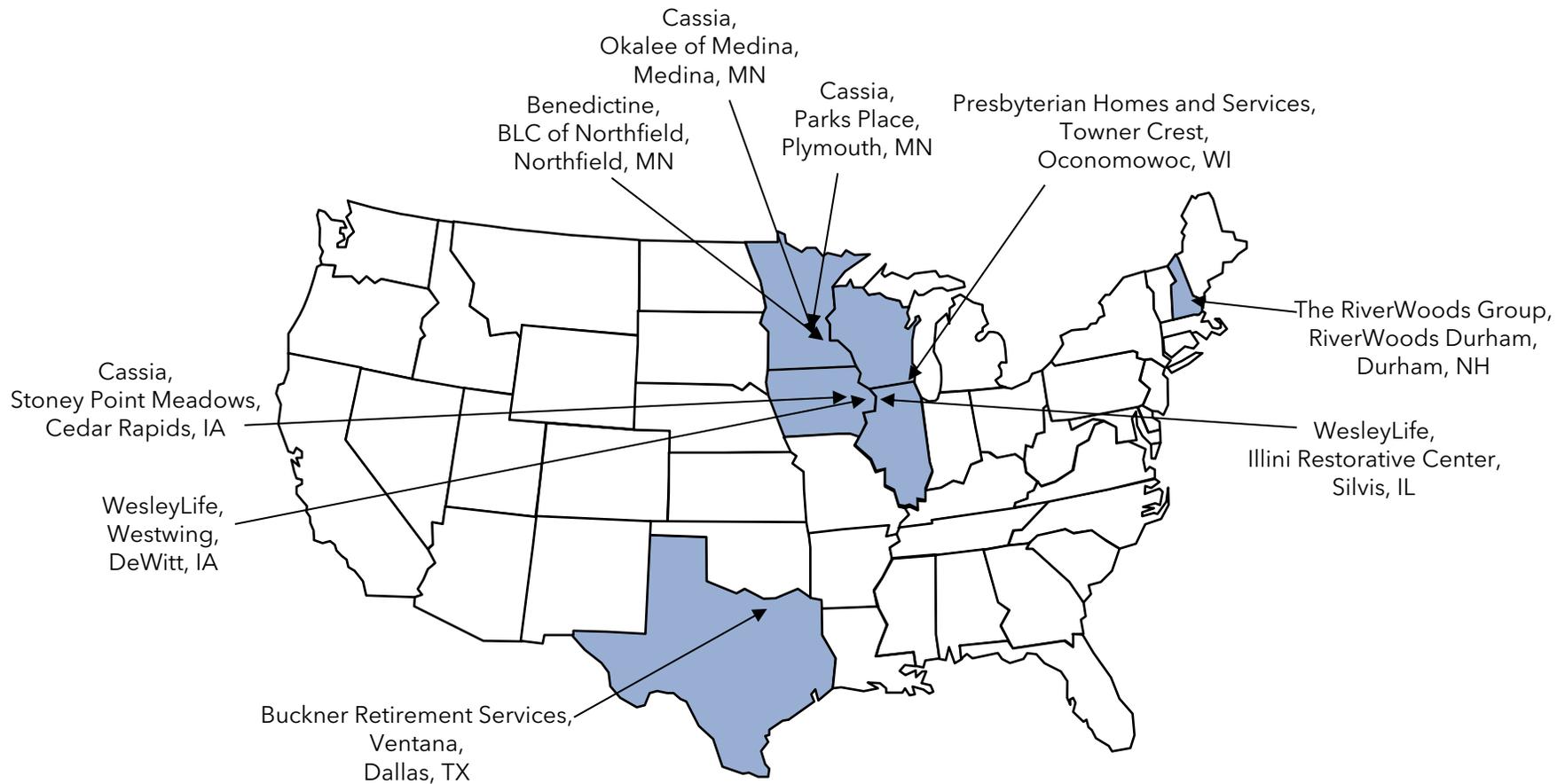
Growth: New Communities

2019 Community Openings

2020 Rank	System Name	Community	City	State	Community Type
5	Presbyterian Homes and Services	Towner Crest	Oconomowoc	WI	IL
10	Benedictine fka Benedictine Health System	BLC of Northfield	Northfield	MN	AL
13	Cassia	Okalee of Medina	Medina	MN	AL
13	Cassia	Parks Place	Plymouth	MN	AL
13	Cassia	Stoney Point Meadows	Cedar Rapids	IA	AL
36	WesleyLife	Illini Restorative Center	Silvis	IL	LPC
36	WesleyLife	Westwing	DeWitt	IA	LPC
41	Buckner Retirement Services, Inc.	Ventana	Dallas	TX	LPC
108	The RiverWoods Group	RiverWoods Durham	Durham	NH	LPC

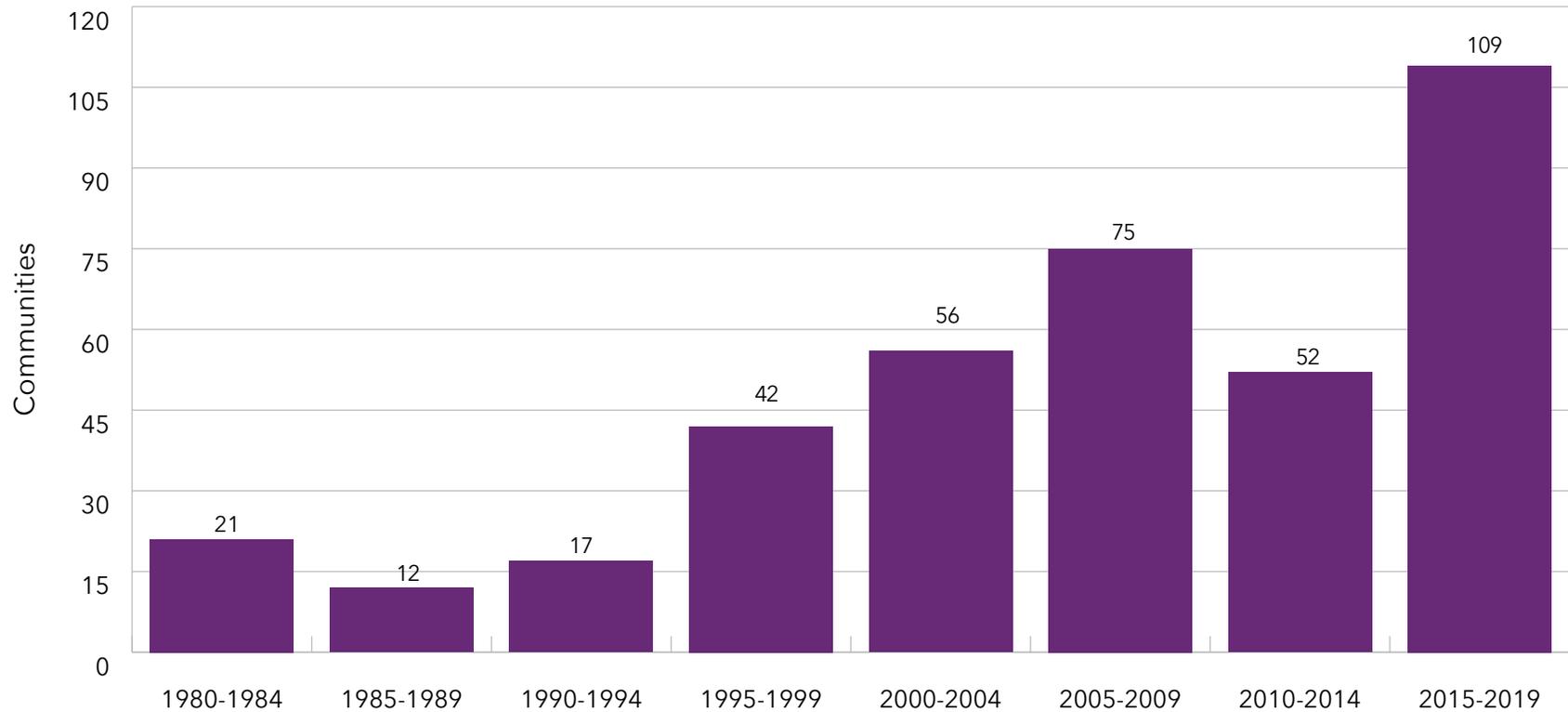
LPC = Life Care Community

Growth: New Communities 2019 Locations



Growth: Mergers/Acquisitions/Affiliations

Historical Growth

**KEY:**

 Merger/Aquisition/Affiliation

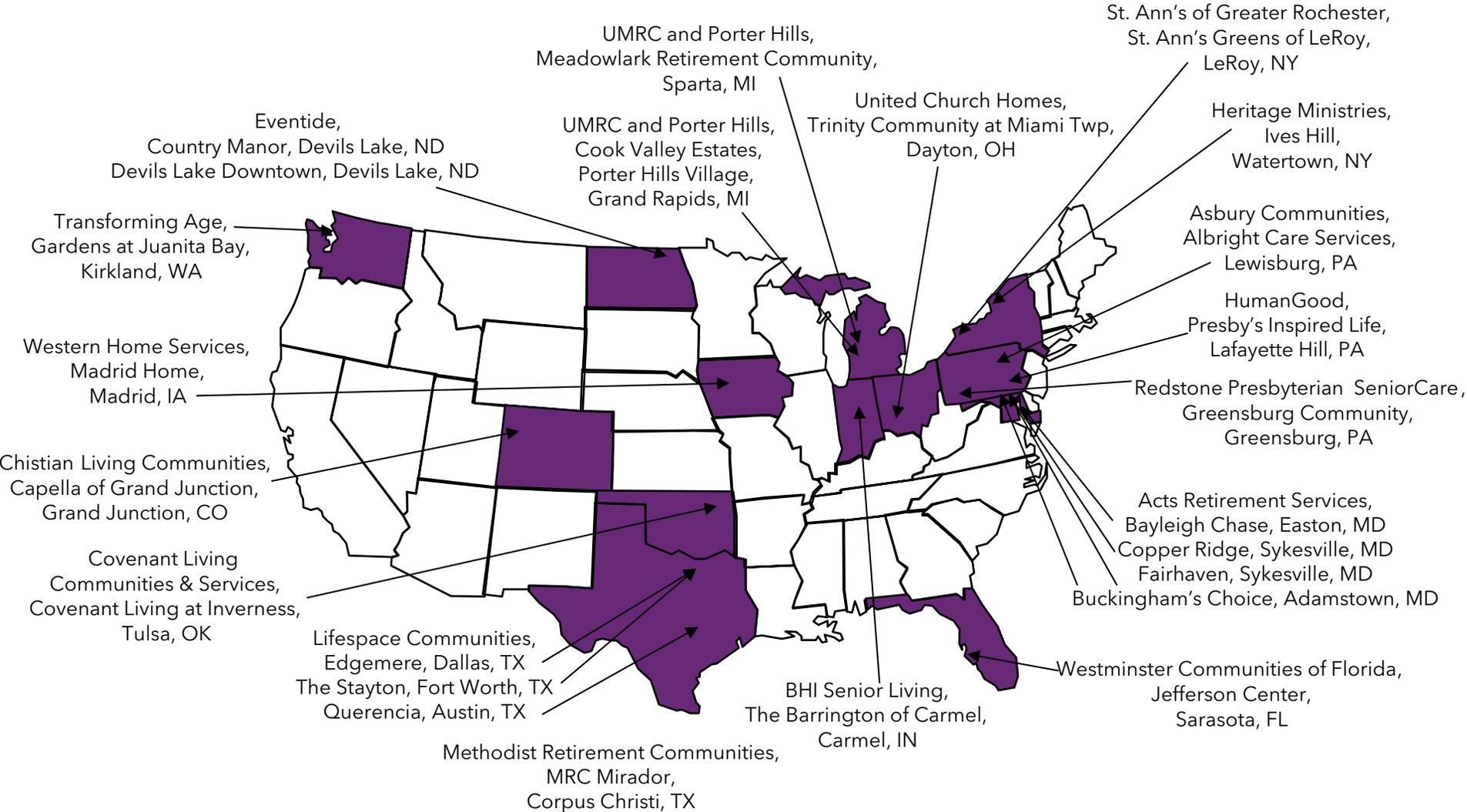
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Growth: Mergers/Acquisitions/Affiliations

2019 Mergers/Acquisitions/Affiliations

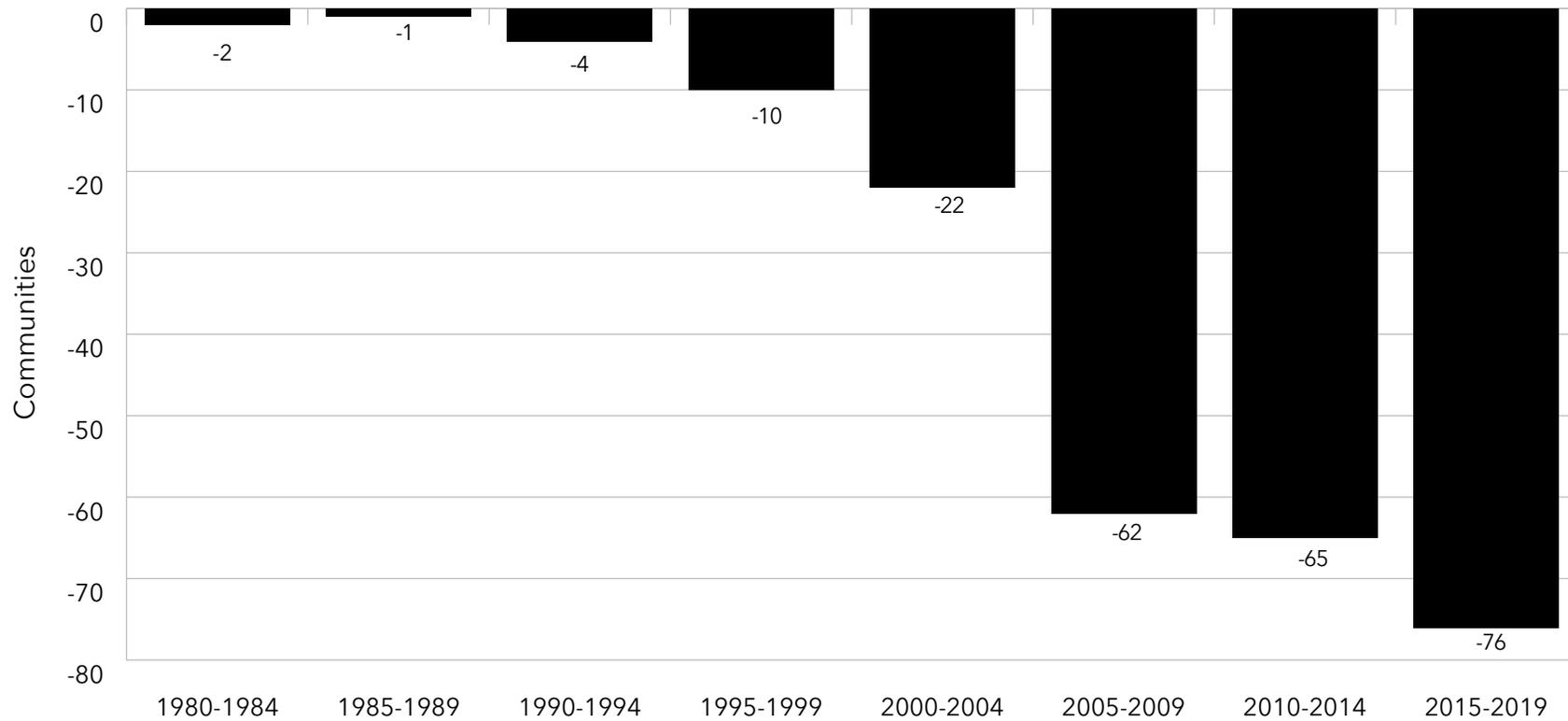
2020 Rank	System Name	Community	City	State	Community Type
3	ACTS Retirement Services, Inc.	Bayleigh Chase	Easton	MD	LPC
3	ACTS Retirement Services, Inc.	Buckingham's Choice	Adamstown	MD	LPC
3	ACTS Retirement Services, Inc.	Fairhaven	Sykesville	MD	LPC
3	ACTS Retirement Services, Inc.	Copper Ridge	Sykesville	MD	AL
7	HumanGood	Presby's Inspired Life	Lafayette Hills	PA	LPC
8	Covenant Living Communities & Services	Covenant Living at Inverness	Tulsa	OK	LPC
9	Lifespace Communities Inc.	Edgemere	Dallas	TX	LPC
9	Lifespace Communities Inc.	Querencia	Austin	TX	LPC
9	Lifespace Communities Inc.	The Stayton	Fort Worth	TX	LPC
11	Westminster Communities of Florida	Jefferson Center	Sarasota	FL	IL
16	Asbury Communities, Inc.	Albright Care Services	Lewisburg	PA	LPC
35	Transforming Age	Gardens at Juanita Bay	Kirkland	WA	AL
49	BHI Senior Living Inc	The Barrington of Carmel	Carmel	IN	LPC
51	United Church Homes, Inc.	Trinity Community at Miami Township	Dayton	OH	IL
59	Methodist Retirement Communities	MRC Mirador	Corpus Christi	TX	LPC
64	Heritage Ministries	Ives Hill	Watertown	NY	IL
68	UMRC and Porter Hills	Cook Valley Estates	Grand Rapids	MI	IL
68	UMRC and Porter Hills	Meadowlark Retirement Community	Sparta	MI	AL
68	UMRC and Porter Hills	Porter Hills Village	Grand Rapids	MI	LPC
71	Western Home Services	Madrid Home	Madrid	IA	LPC
73	Eventide	Country Manor	Devils Lake	ND	AL
73	Eventide	Devils Lake Downtown	Devils Lake	ND	NH
96	Christian Living Communities	Capella of Grand Junction	Grand Junction	CO	AL
98	St. Ann's of Greater Rochester, Inc.	St. Ann's Greens of LeRoy	LeRoy	NY	IL
171	Redstone Presbyterian SeniorCare	Greensburg Community	Greensburg	PA	IL

Growth: Affiliations/Mergers/Acquisitions 2019 Locations



Growth: Dispositions

Historical Growth



KEY:  Disposition

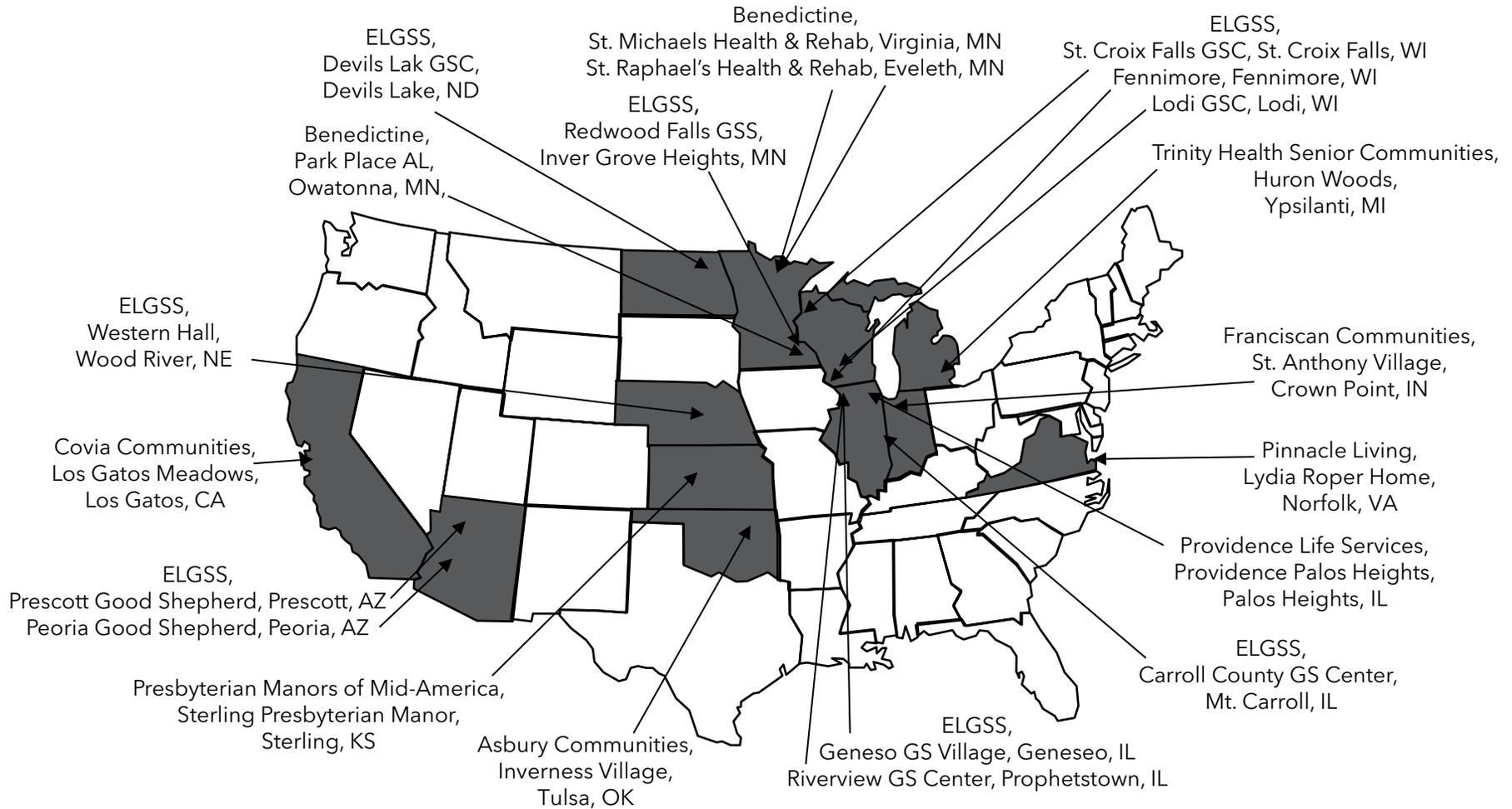
Disposition: The sale or closure of a community.

Growth: Dispositions

2019 Community Closures or Dispositions

2020 Rank	System Name	Community	City	State	Community Type
2	The Evangelical Lutheran Good Samaritan Society	Devils Lake GSC	Devils Lake	ND	NH
2	The Evangelical Lutheran Good Samaritan Society	Fennimore	Fennimore	WI	LPC
2	The Evangelical Lutheran Good Samaritan Society	Geneso GS Village	Geneseo	IL	LPC
2	The Evangelical Lutheran Good Samaritan Society	Lodi GSC	Lodi	WI	LPC
2	The Evangelical Lutheran Good Samaritan Society	Mt. Carroll (Carroll County GS Center)	Mount Carroll	IL	NH
2	The Evangelical Lutheran Good Samaritan Society	Peoria Good Shepherd	Peoria	AZ	LPC
2	The Evangelical Lutheran Good Samaritan Society	Prescott Good Shepherd	Prescott	AZ	LPC
2	The Evangelical Lutheran Good Samaritan Society	Redwood Falls GSS	Inver Grove Hts.	MN	NH
2	The Evangelical Lutheran Good Samaritan Society	Riverview GS Center	Prophetstown	IL	LPC
2	The Evangelical Lutheran Good Samaritan Society	St. Croix Falls GSC	Saint Croix Falls	WI	LPC
2	The Evangelical Lutheran Good Samaritan Society	Wood River (Western Hall)	Wood River	NE	NH
6	Trinity Health Senior Communities	Huron Woods	Ypsilanti	MI	AL
10	Benedictine fka Benedictine Health System	Park Place Assisted Living	Owatonna	MN	AL
10	Benedictine fka Benedictine Health System	St. Michaels Health and Rehab Center	Virginia	MN	NH
10	Benedictine fka Benedictine Health System	St. Raphael's Health and Rehab Center	Eveleth	MN	NH
16	Asbury Communities, Inc.	Inverness Village	Tulsa	OK	LPC
29	Presbyterian Manors of Mid-America, Inc.	Sterling Presbyterian Manor	Sterling	KS	LPC
40	Franciscan Communities, Inc.	St. Anthony Village	Crown Point	IN	NH
55	Providence Life Services	Providence Palos Heights	Palos Heights	IL	NH
57	Covia Communities	Los Gatos Meadows	Los Gatos	CA	LPC
77	Pinnacle Living	Lydia Roper Home	Norfolk	VA	AL

Growth: Dispositions 2019 Locations



*See 5-11b for list of The Evangelical Lutheran Good Samaritan Society (ELGSS) Communities

Chapter 6

Additional Listings

Additional listings have been added to LZ 200 since its inaugural publication: single-campus senior living, largest individual campuses, affordable housing providers, and multi-site senior living that include affordable housing units. While some of the organizations on these lists may also appear in LZ 200, 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 the affordable housing listings in Chapter 6 continue to reflect the largest 100 and were not expanded to the largest 200, as with the multi-site listings. However, the single-campus senior living listings have increased to the largest 150 and extends to the Over 150.

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

Chart 6-1c shows that nearly 55% of these organizations offer some type of home-based care, either to residents or to individuals in the greater community. Figure 6-1d reveals that the majority of these organizations have adopted Electronic Medical/Health Records (EMR/EHR) and Electronic Point of Care/Point of Service (POC/POS) Documentation Systems.

Largest Individual Campuses

Added back in the publication last year is a listing of the largest 150 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 6-1f). The largest campus, Riderwood Village (MD), has a total of 2,175 market-rate units.

Affordable Housing Providers

Using the LeadingAge Directory of Members and LeadingAge contact information, systems providing affordable (non-market-rate) and government-subsidized housing were researched and ranked according to the number of affordable housing units offered. This listing includes many organizations that are not on the LZ 200 multi-site senior living organization listing (Chart 6-2).

Systems by Total Market-Rate and Affordable Units

Chart 6-3 presents an aggregate ranking of unit types, market rate, and affordable. This type of ranking better reflects the size and scope of each organization that provides residential options for seniors of varying income levels. For example, National Church Residences is ranked as LZ 200 #44 (Primary Ranking) with 1,607 total market-rate units; the organization is ranked #1 among this year's listing of affordable housing providers with 17,710 total affordable housing units (Chart 6-2), a decrease of roughly 651 affordable units in the past year. By aggregating these two categories of seniors housing, the organization is the largest among the LZ 200 with 19,317 total units.



Additional Listings: Single-Campus Senior Living Communities

The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations

2020 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
1	Charlestown Community, Inc.	Catonsville	MD	1,815	1,484	125	206	81.8%	6.9%	11.3%
2	John Knox Village	Lee's Summit	MO	1,548	1,099	183	266	71.0%	11.8%	17.2%
3	The Mennonite Village	Albany	OR	1,048	298	131	619	28.4%	12.5%	59.1%
4	Henry Ford Village	Dearborn	MI	1,037	852	96	89	82.2%	9.3%	8.6%
5	The Hebrew Home at Riverdale	Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
6	Panorama	Lacey	WA	978	784	39	155	80.2%	4.0%	15.8%
7	John Knox Village of Florida	Pompano Beach	FL	930	667	64	199	71.7%	6.9%	21.4%
8	Cross Keys Village - The Brethren Home Community	New Oxford	PA	927	534	123	270	57.6%	13.3%	29.1%
9	Brethren Village	Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%
10	Mennonite Home Communities	Lancaster	PA	840	502	150	188	59.8%	17.9%	22.4%
11	Westminster Canterbury Richmond	Richmond	VA	820	498	164	158	60.7%	20.0%	19.3%
12	Menorah Park Center for Senior Living	Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
13	Charles E. Smith Life Communities	Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
14	Friendship Village Tempe	Tempe	AZ	780	561	91	128	71.9%	11.7%	16.4%
15	Lakeview Village	Lenexa	KS	722	538	26	158	74.5%	3.6%	21.9%
16	The Center for Modern Aging at Glencroft	Glendale	AZ	710	386	99	225	54.4%	13.9%	31.7%
17	Indiana Masonic Home	Franklin	IN	702	120	317	265	17.1%	45.2%	37.7%
18	Atlantic Shores Cooperative Association	Virginia Beach	VA	671	555	66	50	82.7%	9.8%	7.5%
19	The Beatitudes Campus	Phoenix	AZ	654	461	121	72	70.5%	18.5%	11.0%
20	John Knox Village of Central Florida	Orange City	FL	654	455	49	150	69.6%	7.5%	22.9%
21	Miami Jewish Health	Miami	FL	637	99	100	438	15.5%	15.7%	68.8%
22	Army Residence Community	San Antonio	TX	634	465	78	91	73.3%	12.3%	14.4%
23	Tel Hai Retirement Community	Honey Brook	PA	633	404	100	129	63.8%	15.8%	20.4%
24	Mary's Woods at Marylhust Inc.	Lake Oswego	OR	631	481	121	29	76.2%	19.2%	4.6%
25	Westminster-Canterbury on Chesapeake Bay	Virginia Beach	VA	631	443	80	108	70.2%	12.7%	17.1%

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

The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations

2020 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	VMP	West Allis	WI	624	294	180	150	47.1%	28.8%	24.0%
27	Carolina Meadows, Inc.	Chapel Hill	NC	607	443	78	86	73.0%	12.9%	14.2%
28	Copeland Oaks	Sebring	OH	606	200	230	176	33.0%	38.0%	29.0%
29	La Posada at Park Centre, Inc.	Sahuarita	AZ	603	468	135	0	77.6%	22.4%	0.0%
30	Kirby Pines	Memphis	TN	590	426	74	90	72.2%	12.5%	15.3%
31	Springmoor Life Care Retirement Community	Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
32	Twin Lakes Community	Burlington	NC	571	399	56	116	69.9%	9.8%	20.3%
33	St. Camillus	Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
34	Rolling Green Village	Greenville	SC	541	419	50	72	77.4%	9.2%	13.3%
35	Casa de las Campanas	San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
36	Aldersgate United Methodist Retirement Community	Charlotte	NC	537	305	107	125	56.8%	19.9%	23.3%
37	Royal Oaks Life Care Community	Sun City	AZ	535	360	175	0	67.3%	32.7%	0.0%
38	Masonic Care Community	Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
39	Cypress Cove at HealthPark Florida	Fort Myers	FL	529	377	88	64	71.3%	16.6%	12.1%
40	Pine Run Community	Doylestown	PA	525	288	147	90	54.9%	28.0%	17.1%
41	Fleet Landing	Atlantic Beach	FL	524	354	100	70	67.6%	19.1%	13.4%
42	CC Young	Dallas	TX	519	223	167	129	43.0%	32.2%	24.9%
43	The Lutheran Home	Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
44	Wesleyan Homes	Georgetown	TX	513	247	266	0	48.1%	51.9%	0.0%
45	The Advent Christian Village	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
46	Londonderry Village	Palmyra	PA	509	374	35	100	73.5%	6.9%	19.6%
47	Carolina Village, Inc.	Hendersonville	NC	507	389	60	58	76.7%	11.8%	11.4%
48	Deerfield Episcopal Retirement Community, Inc.	Asheville	NC	502	378	62	62	75.3%	12.4%	12.4%
49	Riddle Village	Media	PA	495	360	49	86	72.7%	9.9%	17.4%
50	The Estates at Carpenters	Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%

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

The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations

2020 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	Marquette	Indianapolis	IN	493	314	77	102	63.7%	15.6%	20.7%
52	Williamsburg Landing Inc.	Williamsburg	VA	482	311	98	73	64.5%	20.3%	15.1%
53	Montereau	Tulsa	OK	475	328	73	74	69.1%	15.4%	15.6%
54	Forefront Living fka Presbyterian Village North	Dallas	TX	472	253	146	172	53.6%	30.9%	36.4%
55	Virginia Mennonite Retirement Community	Harrisonburg	VA	470	264	86	120	56.2%	18.3%	25.5%
56	Horizon House	Seattle	WA	467	377	90	0	80.7%	19.3%	0.0%
57	Epworth Villa	Oklahoma City	OK	467	264	116	87	56.5%	24.8%	18.6%
58	The Good Samaritan Home of Quincy	Quincy	IL	465	180	54	231	38.7%	11.6%	49.7%
59	Bridgewater Retirement Community	Bridgewater	VA	463	250	86	127	54.0%	18.6%	27.4%
60	Masonic Village At Burlington	Burlington	NJ	463	233	87	143	50.3%	18.8%	30.9%
61	White Horse Village	Newtown Square	PA	462	335	68	59	72.5%	14.7%	12.8%
62	O'Connor Woods	Stockton	CA	461	245	116	100	53.1%	25.2%	21.7%
63	Paradise Valley Estates	Fairfield	CA	459	321	78	60	69.9%	17.0%	13.1%
64	Waterman Village	Mount Dora	FL	456	259	77	120	56.8%	16.9%	26.3%
65	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
66	Mercy Ridge, Inc.	Timonium	MD	455	408	47	0	89.7%	10.3%	0.0%
67	Orlando Senior Health Network	Orlando	FL	455	200	87	168	44.0%	19.1%	36.9%
68	Lutheran Social Services of Upstate New York	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
69	Mt. San Antonio Gardens	Pomona	CA	444	305	71	68	68.7%	16.0%	15.3%
70	St. Paul Homes	Greenville	PA	442	106	144	192	24.0%	32.6%	43.4%
71	Cornwall Manor	Cornwall	PA	441	315	30	96	71.4%	6.8%	21.8%
72	North Hill Needham Inc.	Needham	MA	439	322	45	72	73.3%	10.3%	16.4%
73	Arbor Acres United Methodist Retirement Community	Winston-Salem	NC	439	259	97	83	59.0%	22.1%	18.9%
74	Westminster	Austin	TX	435	328	22	85	75.4%	5.1%	19.5%
75	Falcon's Landing	Sterling	VA	435	304	71	60	69.9%	16.3%	13.8%

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

The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations

2020 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	Carol Woods Retirement Community	Chapel Hill	NC	434	315	59	60	72.6%	13.6%	13.8%
77	The Trezevant Episcopal Home	Memphis	TN	434	226	104	104	52.1%	24.0%	24.0%
78	Mease Manor, Inc.	Dunedin	FL	434	194	140	100	44.7%	32.3%	23.0%
79	Marquardt Village	Watertown	WI	433	201	92	140	46.4%	21.2%	32.3%
80	Laurel Lake Retirement Community	Hudson	OH	430	289	66	75	67.2%	15.3%	17.4%
81	Dunwoody Village	Newtown Square	PA	430	268	61	101	62.3%	14.2%	23.5%
82	Greenwood Village South	Greenwood	IN	429	253	45	131	59.0%	10.5%	30.5%
83	The Highlands at Wyomissing	Wyomissing	PA	428	282	66	80	65.9%	15.4%	18.7%
84	The Forum at Rancho San Antonio	Cupertino	CA	425	319	58	48	75.1%	13.6%	11.3%
85	Penney Retirement Community, Inc.	Penney Farms	FL	422	297	75	50	70.4%	17.8%	11.8%
86	Oak Hammock at the University of Florida	Gainesville	FL	412	269	70	73	65.3%	17.0%	17.7%
87	Aldersgate Village	Topeka	KS	412	156	60	196	37.9%	14.6%	47.6%
88	Meadowood	Worcester	PA	408	293	56	59	71.8%	13.7%	14.5%
89	Moravian Manor Communities	Lititz	PA	405	228	58	119	56.3%	14.3%	29.4%
90	Bishop Gadsden Episcopal Retirement Community	Charleston	SC	403	268	89	46	66.5%	22.1%	11.4%
91	Bay Village of Sarasota, Inc.	Sarasota	FL	401	284	22	95	70.8%	5.5%	23.7%
92	Well•Spring	Greensboro	NC	401	261	70	70	65.1%	17.5%	17.5%
93	Westminster Canterbury of Lynchburg	Lynchburg	VA	400	238	57	105	59.5%	14.3%	26.3%
94	Peconic Landing at Southold, Inc	Greenport	NY	398	296	42	60	74.4%	10.6%	15.1%
95	EdenHill Communities	New Braunfels	TX	398	147	67	184	36.9%	16.8%	46.2%
96	Pennswood Village	Newtown	PA	395	301	41	53	76.2%	10.4%	13.4%
97	Willamette View Inc	Portland	OR	393	300	87	6	76.3%	22.1%	1.5%
98	Brandermill Woods	Midlothian	VA	393	274	59	60	69.7%	15.0%	15.3%
99	Kahala Nui fka Kahala Senior Living Community	Honolulu	HI	393	270	63	60	68.7%	16.0%	15.3%
100	Quarryville Presbyterian Retirement Community	Quarryville	PA	393	214	69	110	54.5%	17.6%	28.0%

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

The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations

2020 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
101	Frasier	Boulder	CO	392	300	38	54	76.5%	9.7%	13.8%
102	Fellowship Village (Fellowship Senior Living)	Basking Ridge	NJ	392	257	81	54	65.6%	20.7%	13.8%
103	Galloway Ridge	Pittsboro	NC	391	300	51	40	76.7%	13.0%	10.2%
104	Westminster-Canterbury of the Blue Ridge	Charlottesville	VA	390	281	57	52	72.1%	14.6%	13.3%
105	Foulkeways at Gwynedd	Gwynedd	PA	387	252	89	46	65.1%	23.0%	11.9%
106	Homestead Village, Inc.	Lancaster	PA	387	229	87	71	59.2%	22.5%	18.3%
107	The Pines at Whiting	Manchester	NJ	385	232	87	66	60.3%	22.6%	17.1%
108	Tacoma Lutheran Retirement Community	Tacoma	WA	385	145	53	187	37.7%	13.8%	48.6%
109	St Mark Village Inc	Palm Harbor	FL	384	256	128	0	66.7%	33.3%	0.0%
110	The Osborn Network	Rye	NY	382	195	103	84	51.0%	27.0%	22.0%
111	Wesbury	Meadville	PA	382	81	91	210	21.2%	23.8%	55.0%
112	Snyder Village	Metamora	IL	381	210	65	106	55.1%	17.1%	27.8%
113	Pleasant View Communities fka Pleasant View Retirement Community	Manheim	PA	381	152	96	133	39.9%	25.2%	34.9%
114	Warm Hearth Village	Blacksburg	VA	380	170	150	60	44.7%	39.5%	15.8%
115	The Meth-Wick Community Inc.	Cedar Rapids	IA	378	247	62	69	65.3%	16.4%	18.3%
116	Butterfield Trail Village, Inc.	Fayetteville	AR	376	274	15	87	72.9%	4.0%	23.1%
117	Village on The Isle	Venice	FL	374	246	64	64	65.8%	17.1%	17.1%
118	St. James Place	Baton Rouge	LA	372	216	66	90	58.1%	17.7%	24.2%
119	Jefferson's Ferry	So. Setauket	NY	368	248	60	60	67.4%	16.3%	16.3%
120	Tabor Hills Healthcare	Naperville	IL	368	104	95	169	28.3%	25.8%	45.9%
121	Peabody Retirement Community	North Manchester	IN	367	57	118	192	15.5%	32.2%	52.3%
122	The Pines at Davidson	Davidson	NC	364	250	30	84	68.7%	8.2%	23.1%
123	Dallas Retirement Village	Dallas	OR	364	158	85	121	43.4%	23.4%	33.2%
124	Capital Manor	Salem	OR	363	280	83	0	77.1%	22.9%	0.0%
125	Brethren Hillcrest Homes	La Verne	CA	357	226	72	59	63.3%	20.2%	16.5%

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

The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations

2020 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
126	Plymouth Place	La Grange Park	IL	357	182	91	84	51.0%	25.5%	23.5%
127	Brookhaven at Lexington	Lexington	MA	356	288	19	49	80.9%	5.3%	13.8%
128	Brewster Place	Topeka	KS	356	231	28	97	64.9%	7.9%	27.2%
129	Friendship Village of Columbus	Columbus	OH	356	201	80	75	56.5%	22.5%	21.1%
130	Meadowlark Hills	Manhattan	KS	355	167	54	134	47.0%	15.2%	37.7%
131	Pennybyrn at Maryfield, Inc.	High Point	NC	353	180	48	125	51.0%	13.6%	35.4%
132	Atherton Baptist Homes	Alhambra	CA	352	217	36	99	61.6%	10.2%	28.1%
133	Southminster, Inc.	Charlotte	NC	350	265	25	60	75.7%	7.1%	17.1%
134	Broadmead, Inc.	Cockeysville	MD	349	249	30	70	71.3%	8.6%	20.1%
135	Niagara Lutheran Health System	Lancaster	NY	349	92	97	160	26.4%	27.8%	45.8%
136	The GreenFields	Lancaster	NY	349	92	97	160	26.4%	27.8%	45.8%
137	The Hill at Whitemarsh	Lafayette Hill	PA	348	260	28	60	74.7%	8.0%	17.2%
138	Wake Robin Corporation	Shelburne	VT	346	250	41	55	72.3%	11.8%	15.9%
139	Sunnyside Village	Sarasota	FL	342	226	56	60	66.1%	16.4%	17.5%
140	The Forest at Duke	Durham	NC	341	249	34	58	73.0%	10.0%	17.0%
141	Friendsview fka Friendsview Retirement Community	Newberg	OR	338	237	101	0	70.1%	29.9%	0.0%
142	Mayflower Retirement Center Inc.	Winter Park	FL	337	246	31	60	73.0%	9.2%	17.8%
143	Nazareth Living Center	St. Louis	MO	335	100	114	121	29.9%	34.0%	36.1%
144	The Mayflower Retirement Center	Winter Park	FL	334	246	28	60	73.7%	8.4%	18.0%
145	Oklahoma Methodist Manor	Tulsa	OK	334	212	40	82	63.5%	12.0%	24.6%
146	Wesley Commons	Greenwood	SC	333	193	60	80	58.0%	18.0%	24.0%
147	Swiss Village Inc.	Berne	IN	331	87	116	128	26.3%	35.0%	38.7%
148	Westminster Village, Inc.	Bloomington	IL	328	196	54	78	59.8%	16.5%	23.8%
149	Shenandoah Valley Westminster Canterbury	Winchester	VA	326	215	60	51	66.0%	18.4%	15.6%
150	Vicar's Landing	Ponte Vedra Beach	FL	325	227	38	60	69.8%	11.7%	18.5%
								59.5%	17.3%	23.4%

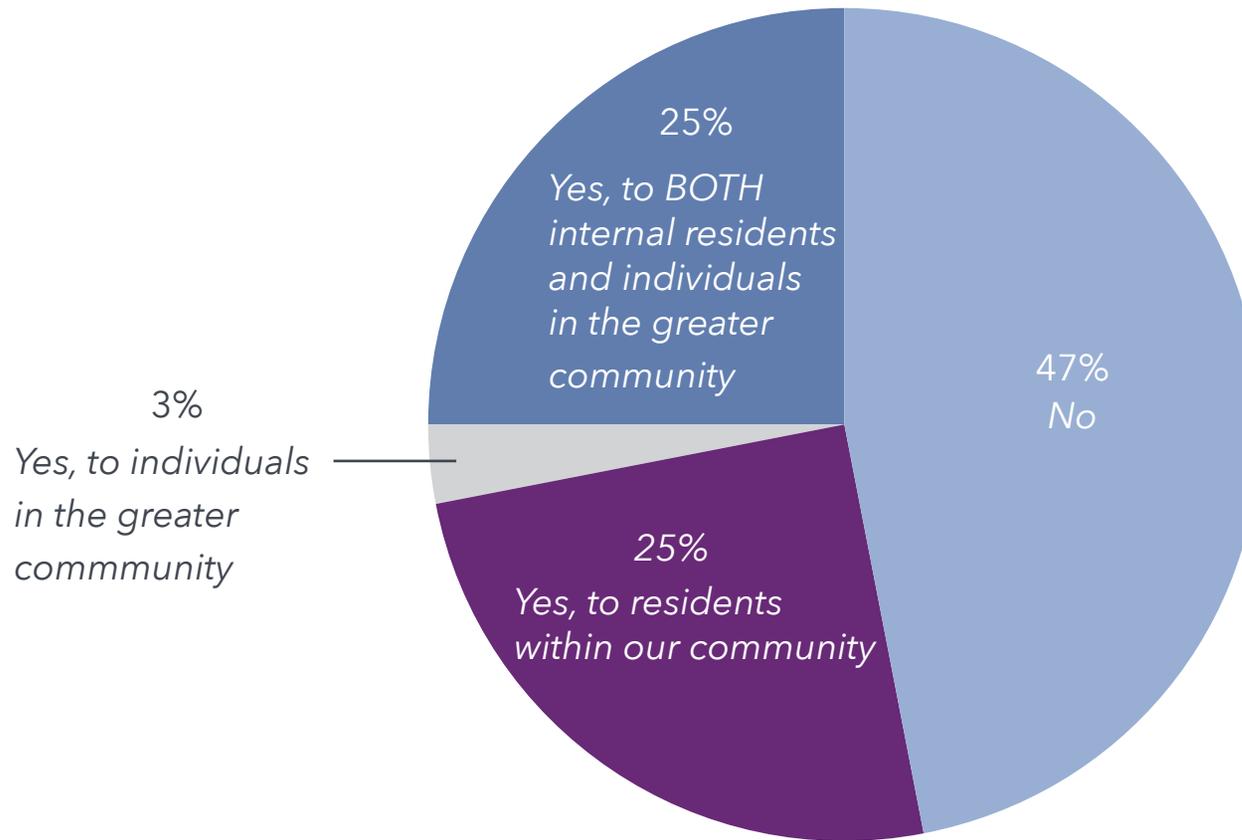
Additional Listings: Single-Campus Senior Living Communities The Over 150

The LZ 150 stops at the 150th largest single-site campus, leaving a number of senior living communities just beyond the list's cut-off. The Over 150 represents organizations ranked from 151-200.

Over 150 (324 to 296 Total Units)	Over 150 (293 to 245 Total Units)
Attic Angel Community (WI)	Bartels Lutheran Home (IA)
Augsburg Village (MD)	Beacon Hill at Eastgate (MI)
Brevillier Village (PA)	Bishop Drumm (IA)
Burcham Hills (MI)	Blakeford at Green Hills (TN)
California Armenian Homes and The Vineyards (CA)	Brethren Care Village (OH)
Carleton-Willard Homes, Inc. (MA)	Canterbury Court (GA)
Carlyle Place (GA)	Canterbury-on-the-Lake (MI)
Clare Oaks Senior Living (IL)	Central Baptist Home (IL)
Duncaster (CT)	Christwood (LA)
D'Youville Life & Wellness Community (MA)	Church of Christ Care Center (MI)
Edgewood (MA)	Clark-Lindsey Village, Inc. (IL)
Evergreen Retirement Community (WI)	Clement Manor (WI)
Frederick Living (PA)	Green Hills Community (OH)
Ginger Cove (MD)	Hill View Retirement Community (OH)
Salemtowne (NC)	Holy Cross Village at Notre Dame (IN)
Sierra Winds (AZ)	Immanuel Lutheran Communities (MT)
Spring Harbor at Green Island (GA)	Lambeth House (LA)
St. Martin's in the Pines (AL)	Milwaukee Catholic Home, Inc. (WI)
Still Hopes Episcopal Retirement Community (SC)	Piper Shores (ME)
The Briarwood Community (MA)	RiverMead (NH)
The Methodist Oaks (SC)	Rose Villa (OR)
The Sarah Community (MO)	Spanish Cove Retirement Village (GA)
Waverly Heights Ltd. (PA)	St. Anne's Retirement Community (PA)
Westminster Village (NY)	Taylor Community (NH)
Woodland Pond at New Paltz (NY)	The Glen Retirement System (LA)

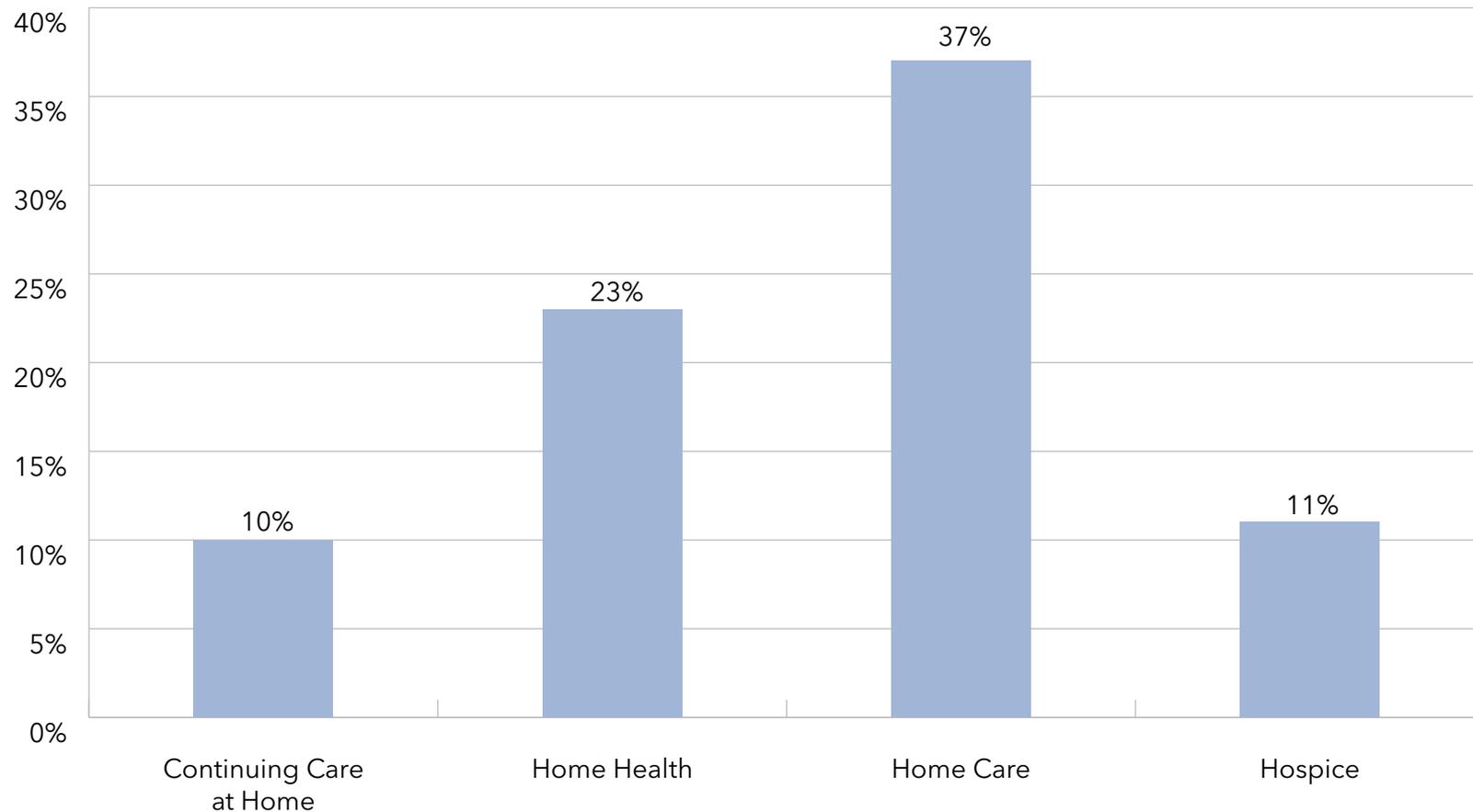
Additional Listings: Single-Campus Senior Living Communities *The Largest 150 Single-Campus Providers of HCBS*

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



n = 121

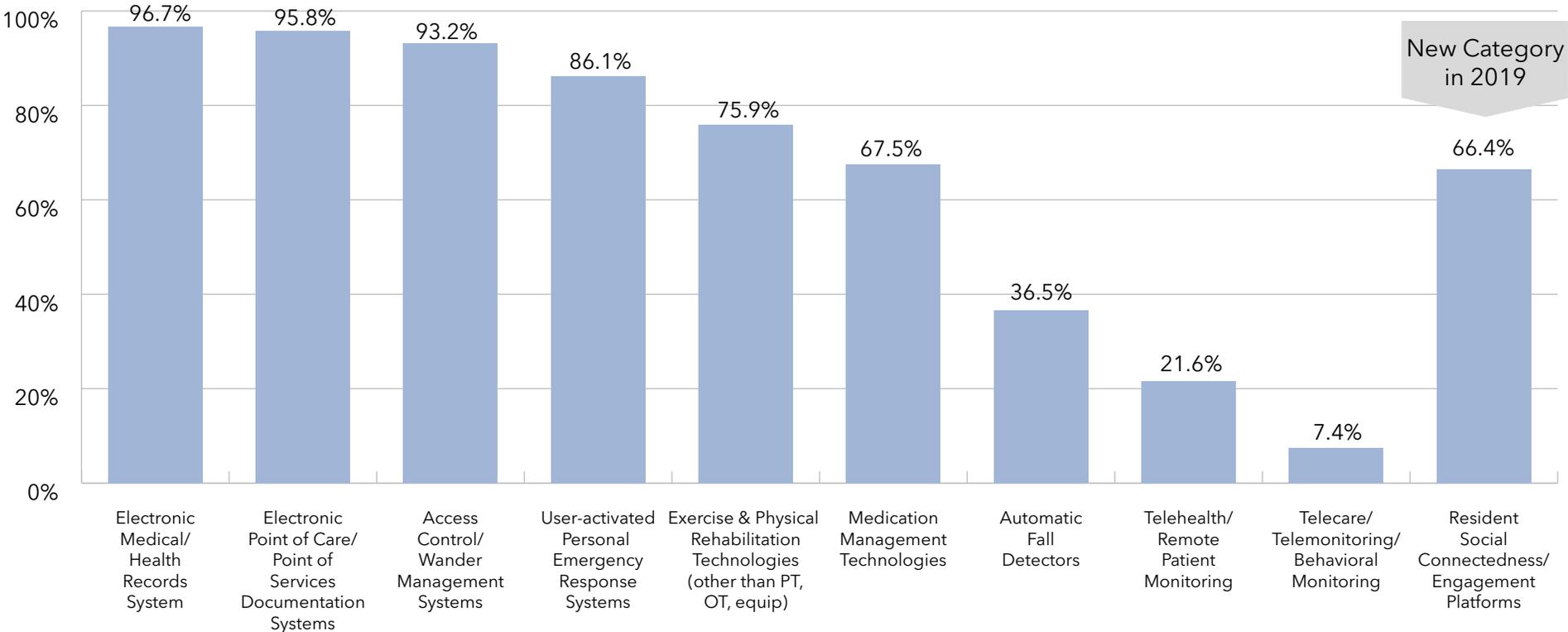
Additional Listings: Single-Campus Senior Living Communities Offering: Hospice, Home Care, Home Health & Continuing Care at Home



n = 103 (avg)

Additional Listings: Single-Campus Senior Living Communities

Technology Adoption: The Largest 150 Single-Campus Providers



n = 115 (avg)

Additional Listings: Largest Individual Campuses

The Nation's 150 Largest Not-for Profit Senior Living Communities

2020 Rank	2019 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
1	1	Riderwood Village	National Senior Campuses	Silver Spring	MD	2,175	1,812	246	117	83.3%	11.3%	5.4%
2	2	Shell Point Retirement Community	The Christian & Missionary Alliance Foundation, Inc.	Fort Myers	FL	1,890	1,268	424	198	67.1%	22.4%	10.5%
3	3	Oak Crest	National Senior Campuses	Parkville	MD	1,843	1,512	171	160	82.0%	9.3%	8.7%
4	4	Charlestown Community, Inc.		Catonsville	MD	1,815	1,484	125	206	81.8%	6.9%	11.3%
5	5	Greenspring Village	National Senior Campuses	Springfield	VA	1,668	1,397	179	92	83.8%	10.7%	5.5%
6	7	Ann's Choice	National Senior Campuses	Warminster	PA	1,653	1,472	105	76	89.1%	6.4%	4.6%
7	6	Cedar Crest Village	National Senior Campuses	Pompton Plains	NJ	1,646	1,451	82	113	88.2%	5.0%	6.9%
8	10	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 Campuses	Peabody	MA	1,554	1,344	124	86	86.5%	8.0%	5.5%
10	8	John Knox Village		Lee's Summit	MO	1,548	1,099	183	266	71.0%	11.8%	17.2%
11	11	Maris Grove	National Senior Campuses	Glen Mills	PA	1,294	1,117	89	88	86.3%	6.9%	6.8%
12	12	Fox Run	National Senior Campuses	Novi	MI	1,279	1,147	88	44	89.7%	6.9%	3.4%
13	13	Seabrook Village	National Senior Campuses	Tinton Falls	NJ	1,222	1,053	96	73	86.2%	7.9%	6.0%
14	14	Linden Ponds	National Senior Campuses	Hingham	MA	1,218	1,086	66	66	89.2%	5.4%	5.4%
15	15	Asbury Methodist Village	Asbury Communities	Gaithersburg	MD	1,200	810	133	257	67.5%	11.1%	21.4%
16	16	Ashby Ponds	National Senior Campuses	Ashburn	VA	1,085	942	99	44	86.8%	9.1%	4.1%
17	17	Henry Ford Village		Dearborn	MI	1,037	852	96	89	82.2%	9.3%	8.6%
18	18	The Hebrew Home at Riverdale		Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
19	19	Panorama		Lacey	WA	978	784	39	155	80.2%	4.0%	15.8%
20	21	Friendship Village of Schaumburg	Friendship Senior Options	Schaumburg	IL	951	597	106	248	62.8%	11.1%	26.1%
21	22	Willow Valley Lakes Manor	Willow Valley Communities	Lancaster	PA	934	706	143	85	75.6%	15.3%	9.1%
22	24	Cross Keys Village - The Brethren Home Community		New Oxford	PA	927	534	123	270	57.6%	13.3%	29.1%
23	20	John Knox Village of Florida		Pompano Beach	FL	912	654	64	194	71.7%	7.0%	21.3%
24	23	Wind Crest Village	National Senior Campuses	Highlands Ranch	CO	909	908	0	0	99.9%	0.0%	0.0%
25	25	Kissimmee Good Sam	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 150 Largest Not-for Profit Senior Living Communities

2020 Rank	2019 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
26	26	Highland Springs	National Senior Campuses	Dallas	TX	869	869	0	0	100.0%	0.0%	0.0%
27	29	Brethren Village		Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%
28	31	Mennonite Home Communities		Lancaster	PA	840	502	150	188	59.8%	17.9%	22.4%
29	27	Westminster Canterbury Richmond		Richmond	VA	820	498	164	158	60.7%	20.0%	19.3%
30	28	St. John's Homes & Meadows		Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
31	30	Rogue Valley Manor	Pacific Retirement Services	Medford	OR	806	605	97	104	75.1%	12.0%	12.9%
32	32	Heritage Pointe	United Methodist Memorial Home	Warren	IN	796	152	458	186	19.1%	57.5%	23.4%
33	34	Menorah Park Center for Senior Living		Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
34	36	Greencroft Goshen	Greencroft Communities	Goshen	IN	785	416	129	240	53.0%	16.4%	30.6%
35	35	Charles E. Smith Life Communities		Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
36	33	Friendship Village Tempe		Tempe	AZ	780	561	91	128	71.9%	11.7%	16.4%
37	37	Glencroft Senior Living		Glendale	AZ	776	470	99	207	60.6%	12.8%	26.7%
38	38	Luther Manor	Luther Manor	Wauwatosa	WI	762	381	158	223	50.0%	20.7%	29.3%
39	39	The Wartburg Adult Care Community		Mount Vernon	NY	758	505	105	148	66.6%	13.9%	19.5%
40	40	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	748	326	280	142	43.6%	37.4%	19.0%
41	42	Western Home Communities Main Campus	Western Home Communities	Cedar Falls	IA	747	407	200	140	54.5%	26.8%	18.7%
42	44	Laclede Groves	Lutheran Senior Services	Webster Groves	MO	742	360	132	250	48.5%	17.8%	33.7%
43	43	Indian River Estates East & West	Acts Retirement-Life Communities	Vero Beach	FL	741	568	53	120	76.7%	7.2%	16.2%
44	45	Bethany Lutheran Village		Dayton	OH	739	383	109	247	51.8%	14.7%	33.4%
45	46	Passavant Retirement Community	Lutheran SeniorLife	Zelienople	PA	729	256	214	259	35.1%	29.4%	35.5%
46	48	Otterbein Lebanon Retirement Community	Otterbein SeniorLife	Lebanon	OH	724	450	68	206	62.2%	9.4%	28.5%
47	41	Lakeview Village		Lenexa	KS	722	538	26	158	74.5%	3.6%	21.9%
48	47	Willow Valley Manor North	Willow Valley Communities	Lancaster	PA	711	472	107	132	66.4%	15.0%	18.6%
49	37	The Center for Modern Aging at Glencroft		Glendale	AZ	710	386	99	225	54.4%	13.9%	31.7%
50	49	Compass Park Indiana Masonic Home		Franklin	IN	702	120	317	265	17.1%	45.2%	37.7%

Additional Listings: Largest Individual Campuses (Continued)

The Nation's 150 Largest Not-for Profit Senior Living Communities

2020 Rank	2019 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
51	NR	Indiana Masonic Home		Franklin	IN	702	120	317	265	17.1%	45.2%	37.7%
52	61	Landis Homes	Landis Communities	Lititz	PA	698	514	81	103	73.6%	11.6%	14.8%
53	51	MorseLife		West Palm Beach	FL	688	284	94	310	41.3%	13.7%	45.1%
54	52	Eagle's Trace	National Senior Campuses	Houston	TX	686	686	0	0	100.0%	0.0%	0.0%
55	50	Atlantic Shores Cooperative Association		Virginia Beach	VA	671	555	66	50	82.7%	9.8%	7.5%
56	53	Augustana Care Minneapolis	Cassia	Minneapolis	MN	671	366	0	305	54.5%	0.0%	45.5%
57	54	Waverly Gardens	Presbyterian Homes & Services	North Oaks	MN	669	77	429	163	11.5%	64.1%	24.4%
58	57	St. Ann's Community	St. Ann's of Greater Rochester	Rochester	NY	662	120	120	422	18.1%	18.1%	63.7%
59	81	Concordia Village of Tampa	Concordia Lutheran Ministries	Tampa	FL	661	333	165	163	50.4%	25.0%	24.7%
60	59	The Beatitudes Campus		Phoenix	AZ	654	461	121	72	70.5%	18.5%	11.0%
61	58	John Knox Village of Central Florida		Orange City	FL	654	455	49	150	69.6%	7.5%	22.9%
62	60	LindenGrove Communities		Brookfield	WI	650	0	189	461	0.0%	29.1%	70.9%
63	145	Plantation Estates	Acts Retirement-Life Communities	Matthews	NC	642	502	60	80	78.2%	9.3%	12.5%
64	56	Raybrook Manor	Holland Home	Grand Rapids	MI	638	299	238	101	46.9%	37.3%	15.8%
65	63	Miami Jewish Health		Miami	FL	637	99	100	438	15.5%	15.7%	68.8%
66	62	Army Residence Community		San Antonio	TX	634	465	78	91	73.3%	12.3%	14.4%
67	55	Tel Hai Retirement Community		Honey Brook	PA	633	404	100	129	63.8%	15.8%	20.4%
68	64	Loretto Brighton Campus	Loretto	Syracuse	NY	633	0	79	554	0.0%	12.5%	87.5%
69	NR	Mary's Woods at Marylhust Inc.		Lake Oswego	OR	631	481	121	29	76.2%	19.2%	4.6%
70	70	Westminster-Canterbury on Chesapeake Bay		Virginia Beach	VA	631	443	80	108	70.2%	12.7%	17.1%
71	65	The Village in Gainesville	SantaFe Senior Living	Gainesville	FL	630	497	133	0	78.9%	21.1%	0.0%
72	66	Garden Spot Village	Garden Spot Communities	New Holland	PA	628	542	86	0	86.3%	13.7%	0.0%
73	NR	VMP		West Allis	WI	624	294	180	150	47.1%	28.8%	24.0%
74	NR	Ingleside at King Farm	Ingleside	Rockville	MD	619	366	75	178	59.1%	12.1%	28.8%
75	NR	Westminster Oaks	Westminster Communities of Florida	Tallahassee	FL	616	410	86	120	66.6%	14.0%	19.5%

Additional Listings: Largest Individual Campuses (Continued)

The Nation's 150 Largest Not-for Profit Senior Living Communities

2020 Rank	2019 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
76	68	Fellowship Square-Tucson Campus	Christian Care Companies	Tucson	AZ	615	555	60	0	90.2%	9.8%	0.0%
77	69	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	41.6%	14.8%	43.6%
78	72	Messiah Village	Messiah Lifeways	Mechanicsburg	PA	610	275	157	178	45.1%	25.7%	29.2%
79	67	Carolina Meadows, Inc.		Chapel Hill	NC	607	443	78	86	73.0%	12.9%	14.2%
80	73	Copeland Oaks		Sebring	OH	606	200	230	176	33.0%	38.0%	29.0%
81	71	La Posada at Park Centre, Inc.		Sahuarita	AZ	603	468	135	0	77.6%	22.4%	0.0%
82	74	Ohio Living Breckenridge Village	Ohio Living	Willoughby	OH	603	453	42	108	75.1%	7.0%	17.9%
83	96	St. Andrew's Estates North & South	Acts Retirement-Life Communities	Boca Raton	FL	600	441	70	89	73.5%	11.7%	14.8%
84	75	Brookview	Menno Haven	Chambersburg	PA	599	358	89	152	59.8%	14.9%	25.4%
85	88	Croasdaile Village	The United Methodist Retirement Homes	Durham	NC	593	449	30	114	75.7%	5.1%	19.2%
86	76	Kirby Pines		Memphis	TN	590	426	74	90	72.2%	12.5%	15.3%
87	78	Springmoor Life Care Retirement Community		Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
88	79	Moorings Park	Moorings Park	Naples	FL	584	402	76	106	68.8%	13.0%	18.2%
89	80	Oakwood Village University Woods	Oakwood Lutheran Senior Ministries	Madison	WI	577	382	100	95	66.2%	17.3%	16.5%
90	82	Twin Lakes Community		Burlington	NC	571	399	56	116	69.9%	9.8%	20.3%
91	90	Forefront Living fka Presbyterian Village North		Dallas	TX	571	253	146	172	44.3%	25.6%	30.1%
92	83	Asbury Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	70.3%	17.6%	12.1%
93	84	The Philadelphia Protestant Home		Philadelphia	PA	567	266	175	126	46.9%	30.9%	22.2%
94	85	Otterbein Franklin Retirement Community	Otterbein SeniorLife	Franklin	OH	563	264	91	208	46.9%	16.2%	36.9%
95	86	Bristol Village	National Church Residences	Waverly	OH	558	455	46	57	81.5%	8.2%	10.2%
96	87	Fellowship Square-Phoenix Campus	Christian Care Companies	Phoenix	AZ	558	404	86	68	72.4%	15.4%	12.2%
97	89	East Ridge Retirement Village	SantaFe Senior Living	Cutler Bay	FL	557	247	176	134	44.3%	31.6%	24.1%
98	91	Richfield Retirement Community		Salem	VA	555	76	164	315	13.7%	29.5%	56.8%
99	92	Asbury Place Maryville	Asbury Communities	Maryville	TN	554	261	92	201	47.1%	16.6%	36.3%
100	93	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 150 Largest Not-for Profit Senior Living Communities

2020 Rank	2019 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
101	94	Friendship Village Sunset Hills	Friendship Village of St. Louis	St. Louis	MO	551	372	61	118	67.5%	11.1%	21.4%
102	95	St. Camillus		Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
103	97	Carroll Lutheran Village	Lutheran Social Ministries of Maryland	Westminster	MD	549	396	50	103	72.1%	9.1%	18.8%
104	111	The Moorings of Arlington Heights	Presbyterian Homes, Inc.	Arlington Heights	IL	549	267	183	99	48.6%	33.3%	18.0%
105	98	Mayflower Gardens	Retirement Housing Foundation	Lancaster	CA	548	500	0	48	91.2%	0.0%	8.8%
106	99	The Mennonite Village		Albany	OR	547	321	131	95	58.7%	23.9%	17.4%
107	100	Fountainview at Eisenburg Village	Los Angeles Jewish Home	Reseda	CA	545	108	271	166	19.8%	49.7%	30.5%
108	102	Medford Leas		Medford	NJ	543	401	75	67	73.8%	13.8%	12.3%
109	103	The RiverWoods at Exeter	The RiverWoods Group	Exeter	NH	542	393	71	78	72.5%	13.1%	14.4%
110	101	Rolling Green Village		Greenville	SC	541	419	50	72	77.4%	9.2%	13.3%
111	104	Phoebe Allentown	Phoebe Ministries	Allentown	PA	541	88	58	395	16.3%	10.7%	73.0%
112	105	Casa de las Campanas		San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
113	106	Good Samaritan Village of Hastings	The Evangelical Lutheran Good Samaritan Society	Hastings	NE	540	324	51	165	60.0%	9.4%	30.6%
114	NR	Aldersgate United Methodist Retirement Comm.		Charlotte	NC	537	305	107	125	56.8%	19.9%	23.3%
115	107	Royal Oaks Life Care Community		Sun City	AZ	535	360	175	0	67.3%	32.7%	0.0%
116	108	Masonic Care Community		Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
117	109	Mission Ridge / St. John's Lutheran Home	St. John's Lutheran Ministries	Billings	MT	534	122	226	186	22.8%	42.3%	34.8%
118	110	Westminster Place	Presbyterian Homes, Inc.	Evanston	IL	531	255	88	188	48.0%	16.6%	35.4%
119	140	Breton Woods	Holland Home	Kentwood	MI	529	441	30	58	83.4%	5.7%	11.0%
120	NR	Cypress Cove at HealthPark Florida		Fort Myers	FL	529	377	88	64	71.3%	16.6%	12.1%
121	112	Luther Acres Senior-Living Community	LutherCare	Lititz	PA	528	352	70	106	66.7%	13.3%	20.1%
122	113	Magnolia Manor of Americus	Magnolia Manor	Americus	GA	528	105	187	236	19.9%	35.4%	44.7%
123	114	Covenant Living at Windsor Park		Carol Stream	IL	527	349	101	77	66.2%	19.2%	14.6%
124	115	Blue Skies of Texas East	Blue Skies of Texas	San Antonio	TX	525	371	78	76	70.7%	14.9%	14.5%
125	116	Pine Run Community		Doylestown	PA	525	288	147	90	54.9%	28.0%	17.1%

Additional Listings: Largest Individual Campuses (Continued)

The Nation's 150 Largest Not-for Profit Senior Living Communities

2020 Rank	2019 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/19)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
126	119	Fleet Landing		Atlantic Beach	FL	524	354	100	70	67.6%	19.1%	13.4%
127	118	Cristwood Retirement Community	CRISTA Senior Living	Seattle	WA	524	276	81	167	52.7%	15.5%	31.9%
128	120	Boutwells Landing	Presbyterian Homes & Services	Oak Park Hts.	MN	520	316	96	108	60.8%	18.5%	20.8%
129	121	Lutheran Home	Lutheran Life Communities	Arlington Hts.	IL	520	0	136	384	0.0%	26.2%	73.8%
130	NR	CC Young		Dallas	TX	519	223	167	129	43.0%	32.2%	24.9%
131	122	Givens Estates Campus	Givens Estates	Asheville	NC	518	387	61	70	74.7%	11.8%	13.5%
132	124	Wesley Willows	Wesley Willows	Rockford	IL	517	260	166	91	50.3%	32.1%	17.6%
133	125	Cardinal Carberry Campus	Cardinal Ritter Senior Services	Saint Louis	MO	517	207	80	230	40.0%	15.5%	44.5%
134	126	The Lutheran Home		Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
135	127	Wesleyan Homes		Georgetown	TX	513	247	266	0	48.1%	51.9%	0.0%
136	128	Wesley Homes Des Moines	Wesley	Des Moines	WA	512	325	39	148	63.5%	7.6%	28.9%
137	129	Homewood at Plum Creek	Homewood Retirement Centers	Hanover	PA	512	296	96	120	57.8%	18.8%	23.4%
138	NR	Lakewood Manor	Lifespire of Virginia	Richmond	VA	510	340	74	96	66.7%	14.5%	18.8%
139	130	The Advent Christian Village		Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
140	131	The Buckingham		Houston	TX	510	308	110	92	60.4%	21.6%	18.0%
141	123	Londonderry Village		Palmyra	PA	509	374	35	100	73.5%	6.9%	19.6%
142	133	Menno Village	Menno Haven	Chambersburg	PA	509	224	89	196	44.0%	17.5%	38.5%
143	NR	Ingleside at Rock Creek	Ingleside	Washington	DC	508	232	91	185	45.7%	17.9%	36.4%
144	NR	Carolina Village, Inc.		Hendersonville	NC	507	389	60	58	76.7%	11.8%	11.4%
145	134	Covenant Living at The Holmstad	Covenant Living Communities & Services	Batavia	IL	506	354	62	90	70.0%	12.3%	17.8%
146	135	Covenant Living of Northbrook	Covenant Living Communities & Services	Northbrook	505	505	354	58	93	70.1%	11.5%	18.4%
147	137	Walker Campus	Walker Methodist	Minneapolis	MN	504	128	0	376	25.4%	0.0%	74.6%
148	138	Deerfield Episcopal Retirement Community, Inc.		Asheville	NC	502	378	62	62	75.3%	12.4%	12.4%
149	141	Havenwood Heritage Heights	United Church of Christ Retirement Community, Inc.	Concord	NH	497	347	55	95	69.8%	11.1%	19.1%
150	142	Manor Park		Midland	TX	496	161	173	162	32.5%	34.9%	32.7%
										59.6%	16.9%	23.6%

Additional Listings: Affordable Housing Providers

The Largest Not-for-Profit Providers of Affordable Housing

2020 Aff Hsg Rank	2019 Aff Hsg Rank	System Name	State	Units	Communities
1	1	National Church Residences	OH	17,710	261
2	2	Retirement Housing Foundation	CA	11,984	137
3	3	Volunteers of America	VA	10,812	177
4	4	Mercy Housing	CO	8,206	125
5	7	HumanGood	CA	5,233	65
6	5	Christian Church Homes of Northern California	CA	5052	61
7	6	Sustainable Housing for Ageless Generations (SHAG)	WA	4830	26
8	8	Elderly Housing Development and Operations Corporation	FL	4412	54
9	9	Satellite Affordable Housing Associates	CA	3000	52
10	11	TELACU Residential Management	CA	2399	33
11	12	Christopher Homes	LA	2392	20
12	13	Catholic Housing Management	FL	2246	14
13	14	United Church Homes, Inc.	OH	2,221	52
14	15	CARING Housing Ministries	CA	2127	9
15	17	Wesley Living	TN	2000	28
16	18	Embrace Living Communities	IL	1848	28
17	16	Westminster Communities of Florida	FL	1,834	9
18	19	Associate Catholic Charities (Archdiocese of Baltimore)	MD	1790	24
19	20	Springpoint Senior Living Inc.	NJ	1,785	18
20	21	Episcopal Retirement Services	OH	1,718	27
21	22	Salvation Army Silvercrest Management of California	CA	1678	19
22	23	Presbyterian Village of Michigan	MI	1,570	23
23	24	Catholic Charities of the Archdiocese of Chicago	IL	1499	15
24	25	The Evangelical Lutheran Good Samaritan Society	SD	1,437	33
25	32	Selfhelp Realty Group	OK	1400	6

Additional Listings: Affordable Housing Providers (Continued)

The Largest Not-for-Profit Providers of Affordable Housing

2020 Aff Hsg Rank	2019 Aff Hsg Rank	System Name	State	Units	Communities
26	26	Oklahoma City Housing Authority	MD	1396	10
27	27	Victory Housing, Inc.	IL	1347	16
28	28	Lutheran Social Services of Illinois	IL	1255	17
29	29	New Samaritan Corporation	CA	1251	31
30	30	Menorah Housing Foundation	MA	1221	18
31	31	2Life Communities	NY	1200	4
32	43	Avesta Housing Development Corporation	OR	1188	49
33	33	Presbyterian Senior Living	PA	1,140	17
34	34	Pacific Retirement Services, Inc.	OR	1,045	25
35	35	Presbyterian SeniorCare Network	PA	1,041	23
36	36	Covia Communities	CA	911	8
37	37	Union Labor Retirement Association	ME	900	6
38	38	Wesley Woods Senior Living	GA	890	5
39	39	Lutheran Social Services of Ohio	OH	888	21
40	41	Christian Care Communities	KY	783	11
41	42	Hebrew SeniorLife	MA	769	3
42	44	Graceworks Lutheran Services	OH	723	23
43	45	DePaul Housing Management Corporation	OH	704	14
44	46	Genacross Lutheran Services	OH	697	12
45	47	Aging True	NY	637	4
46	50	Ecumen	MN	626	13
47	49	Sequoia Living, Inc	CA	599	3
48	52	The New Jewish Home	NY	550	5
49	53	Community Housing Management Services	FL	548	11
50	54	Lesley Senior Communities	CA	534	5

Additional Listings: Affordable Housing Providers (Continued)

The Largest Not-for-Profit Providers of Affordable Housing

2020 Aff Hsg Rank	2019 Aff Hsg Rank	System Name	State	Units	Communities
51	55	Christian Concern Communities	CA	516	6
52	56	Presbyterian Homes of Georgia	GA	510	3
53	66	Trinity Health Senior Communities	MI	509	7
54	83 / 90	UMRC and Porter Hills	MI	498	9
55	57	Lutheran Senior Services	MO	495	6
56	51	St. Andrew's Resources for Seniors System	MO	493	10
57	58	LSC Service Corp	PA	492	3
58	69	Council for Jewish Elderly	OH	478	5
59	59	Plano Community Homes Sponsored Properties	TX	474	4
60	60	Jewish Senior Life of Metropolitan Detroit	MI	445	1
61	74	Covenant Health	MA	428	2
62	61	Lutheran Social Ministries of New Jersey, Inc.	NJ	428	5
63	62	Jewish Community Housing Corporation	NJ	369	3
64	63	Bethany Community Services, Inc.	MA	364	3
65	64	Givens Communities	NC	362	2
66	65	Loretto	NY	361	8
67	67	Phoebe Ministries	PA	356	8
68	68	Greencroft Communities	IN	352	3
69	84	Transforming Age	WA	350	9
70	70	Samaritas	MI	340	5
71	71	Christian Care Companies	AZ	339	3
72	73	Diakon Lutheran Social Ministries	PA	335	4
73	72	Goodwill Industries Suncoast	IL	335	5
74	75	Family Housing Management Company	FL	326	3
75	76	NCBA Housing Management Corporation	FL	325	6

Additional Listings: Affordable Housing Providers (Continued)

The Largest Not-for-Profit Providers of Affordable Housing

2020 Aff Hsg Rank	2019 Aff Hsg Rank	System Name	State	Units	Communities
76	77	Spokane Baptist Association Homes	DC	321	2
77	78	Methodist Retirement Communities	TX	319	5
78	79	Elderly Housing Management Corp., Inc.	WA	314	2
79	80	United Methodist Communities	NJ	300	5
80	NR	The Presbyterian Homes, Inc.	NC	297	1
81	94	Christian Health Care Center	NJ	291	3
82	81	Presbyterian Homes and Services	MN	289	3
83	82	Ebenezer Society	MN	274	3
84	97	Asbury Communities, Inc.	MD	263	3
85	85	Santa Clara Methodist Retirement Foundation	FL	254	2
86	87	Sholom	MN	250	3
87	88	Wellspring Lutheran Services	MI	231	5
88	89	Immanuel	NE	230	2
89	86	United Church Homes and Services	NC	220	6
90	91	Lutheran SeniorLife	PA	217	6
91	92	Miravida Living	WI	217	3
92	93	Los Angeles Jewish Home	CA	210	2
93	NR	BHI Senior Living Inc	IN	199	2
94	95	Woodmere Senior Citizens Housing	CA	198	2
95	96	Lutheran Social Services Group	NJ	196	6
96	NR	Ohio Living	OH	190	2
97	98	Saint Elizabeth Community	NY	183	2
98	100	Jewish Senior Housing & Healthcare	RI	178	2
99	NR	Guardian Angels Senior Services fka Guardian Angels of Elk River	NJ	177	5
100	NR	Milton Residences for the Elderly	MN	167	3

NR: Not Ranked in the previous year

Additional Listings: Multi-Site Senior Living Providers Ranked by Total Market-Rate and Affordable Senior Living Units

2020 Combined MR & AFF Rank	2020 LZ200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
1	1	National Senior Campuses	MA	20,917	18,136	1,628	1,153	0
2	44	National Church Residences	OH	19,317	861	521	225	17,710
3	2	The Evangelical Lutheran Good Samaritan Society	SD	16,944	4,795	2,110	8,602	1,437
4	12	Retirement Housing Foundation	CA	16,082	2,646	841	611	11,984
5	26	Volunteers of America	VA	13,296	604	873	1,007	10,812
6	7	HumanGood	CA	10,707	448	273	770	5,233
7	3	ACTS Retirement Services, Inc.	PA	9,592	6,737	1,118	1,737	0
8	4	Ascension Living	MO	8,288	2,124	1,203	4,802	159
9	5	Presbyterian Homes and Services	MN	8,247	4,118	2,389	1,451	289
10	NR	Mercy Housing	CO	8,206	0	0	0	8,206
11	6	Trinity Health Senior Communities	MI	6,224	1,839	1,199	2,677	509
12	11	Westminster Communities of Florida	FL	5,989	2,852	522	781	1,834
13	8	Covenant Living Communities & Services	IL	5,228	3,363	884	981	0
14	9	Lifespace Communities Inc.	IA	5,179	3,663	535	981	0
15	NR	Christian Church Homes of Northern California	CA	5,052	0	0	0	5,052
16	NR	Sustainable Housing for Ageless Generations (SHAG)	WA	4,830	0	0	0	4,830
17	15	Presbyterian Senior Living	PA	4,741	1,920	547	1,134	1,140
18	NR	Elderly Housing Development and Operations Corporation	FL	4,412	0	0	0	4,412
19	10	Benedictine fka Benedictine Health System	MN	4,394	726	1,496	2,172	0
20	25	Springpoint Senior Living Inc.	NJ	4,333	1,740	317	491	1,785
21	20	Pacific Retirement Services, Inc.	OR	4,118	2,310	378	385	1,045
22	13	Cassia	MN	4,075	522	1,512	1,886	155
23	17	Lutheran Senior Services	MO	4,036	1,678	744	1,119	495
24	16	Asbury Communities, Inc.	MD	3,854	2,147	535	909	263
25	51	United Church Homes, Inc.	OH	3,712	448	273	770	2,221

Additional Listings: Multi-Site Senior Living Providers (Continued) Ranked by Total Market-Rate and Affordable Senior Living Units

2020 Combined MR & AFF Rank	2020 LZ200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
26	14	The Kendal Corporation	PA	3,629	2,512	609	508	0
27	18	Ohio Living	OH	3,476	1,732	567	987	190
28	19	The Carmelite System, Inc.	NY	3,157	144	421	2,592	0
29	NR	Satellite Affordable Housing Associates	CA	3,000	0	0	0	3,000
30	21	Front Porch Communities and Services	CA	2,960	2,159	183	518	100
31	62	Presbyterian Village of Michigan	MI	2,840	904	264	102	1,570
32	22	Concordia Lutheran Ministries	PA	2,806	996	1,147	663	0
33	27	Diakon Lutheran Social Ministries	PA	2,745	918	531	961	335
34	28	Christian Care Companies	AZ	2,738	1,911	420	68	339
35	32	Ecumen	MN	2,735	376	1,391	342	626
36	46	Presbyterian SeniorCare Network	PA	2,632	396	520	675	1,041
37	23	Otterbein SeniorLife	OH	2,630	1,123	496	1,011	0
38	24	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,557	1,614	259	684	0
39	NR	TELACU Residential Management	CA	2,399	0	0	0	2,399
40	NR	Christopher Homes	LA	2,392	0	0	0	2,392
41	45	Hebrew SeniorLife	MA	2,361	659	119	814	769
42	154	Episcopal Retirement Services	OH	2,294	267	115	194	1,718
43	57	Covia Communities	CA	2,263	954	100	298	911
44	29	Presbyterian Manors of Mid-America, Inc.	KS	2,247	908	563	776	0
45	NR	Catholic Housing Management	FL	2,246	0	0	0	2,246
46	30	Shell Point Retirement Community	FL	2,204	1,406	449	349	0
47	35	Transforming Age	WA	2,198	1,097	751	0	350
48	37	Greencroft Communities	IN	2,194	646	586	610	352
49	31	Christian Horizons	MO	2,181	383	312	1,486	0
50	NR	CARING Housing Ministries	CA	2,127	0	0	0	2,127

Additional Listings: Multi-Site Senior Living Providers (Continued) Ranked by Total Market-Rate and Affordable Senior Living Units

2020 Combined MR & AFF Rank	2020 LZ200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
51	43	Covenant Health	MA	2,064	0	364	1,272	428
52	33	Willow Valley Communities	PA	2,044	1,547	214	283	0
53	42	Loretto	NY	2,025	210	551	923	361
54	NR	Wesley Living	TN	2,000	0	0	0	2,000
55	34	Homewood Retirement Centers Inc.	MD	1,873	1,134	288	451	0
56	NR	Embrace Living Communities	IL	1,848	0	0	0	1,848
57	36	WesleyLife	IA	1,843	808	375	660	0
58	40	Franciscan Communities, Inc.	IL	1,839	742	345	613	139
59	NR	Associate Catholic Charities (Archdiocese of Baltimore)	MD	1,790	0	0	0	1,790
60	38	ArchCare	NY	1,782	0	59	1,723	0
61	39	Bethesda Senior Living Communities	CO	1,762	111	1,651	0	0
62	49	BHI Senior Living Inc	IN	1,716	472	693	352	199
63	95	Christian Care Communities	KY	1,713	365	160	405	783
64	68	UMRC and Porter Hills	MI	1,697	678	335	186	498
65	41	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	0
66	NR	Salvation Army Silvercrest Management of California	CA	1,678	0	0	0	1,678
67	59	Methodist Retirement Communities	TX	1,635	629	393	294	319
68	55	Providence Life Services	IL	1,582	767	372	282	161
69	47	Lutheran Life Communities	IL	1,551	408	360	783	0
70	93	Sequoia Living, Inc	CA	1,545	702	103	141	599
71	48	Baptist Village Communities	OK	1,521	939	257	325	0
72	72	Phoebe Ministries	PA	1,519	370	259	534	356
73	50	Eskaton	CA	1,507	393	688	426	0
74	NR	Catholic Charities of the Archdiocese of Chicago	IL	1,499	0	0	0	1,499
75	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	0

Additional Listings: Multi-Site Senior Living Providers (Continued) Ranked by Total Market-Rate and Affordable Senior Living Units

2020 Combined MR & AFF Rank	2020 LZ200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
76	66	Immanuel	NE	1,470	646	393	201	230
77	53	Bethesda Health Group, Inc	MO	1,460	727	78	655	0
78	54	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	0
79	56	Presbyterian Homes	IL	1,420	842	237	341	0
80	NR	Selfhelp Realty Group	OK	1,400	0	0	0	1,400
81	NR	Oklahoma City Housing Authority	MD	1,396	0	0	0	1,396
82	107	The New Jewish Home	NY	1,388	24	0	814	550
83	102	St. Andrew's Resources for Seniors System	MO	1,370	379	208	290	493
84	181	Wesley Woods Senior Living	GA	1,367	361	93	23	890
85	NR	Victory Housing, Inc.	IL	1,347	0	0	0	1,347
86	76	Lutheran SeniorLife	PA	1,340	489	192	442	217
87	65	American Baptist Homes of the Midwest	MN	1,336	384	253	608	91
88	58	Masonicare	CT	1,326	651	309	366	0
89	81	The Presbyterian Homes, Inc.	NC	1,325	706	133	189	297
90	60	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	0
91	61	Lutheran Services Carolinas	NC	1,302	311	259	732	0
92	70	SpiriTrust Lutheran	PA	1,299	557	292	344	106
93	67	Wesley Enhanced Living	PA	1,297	629	246	360	62
94	151	Genacross Lutheran Services	OH	1,295	138	175	285	697
95	63	LifeSpire of Virginia	VA	1,269	757	285	227	0
96	64	Heritage Ministries	NY	1,268	363	221	684	0
97	99	Givens Communities	NC	1,257	674	91	130	362
98	NR	Lutheran Social Services of Illinois	IL	1,255	0	0	0	1,255
99	NR	New Samaritan Corporation	CA	1,251	0	0	0	1,251
100	NR	Menorah Housing Foundation	MA	1,221	0	0	0	1,221

NR: No Rank. Not Ranked in the LZ 200 Primary Rankings | MR: Market-rate | AFF: Affordable Housing

LZ 200

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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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