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

2021

18th 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 International Association of Homes and Services for the Aging (IAHSA), whose membership spans 30 countries. LeadingAge is a 501(c)(3) tax-exempt charitable organization focused on education, advocacy, and applied research.

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

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Table of Contents



Welcome Letters	7,9
History	10

Chapter 1

Understanding the LeadingAge Ziegler 200	11
Importance of Not-for-Profits	11
The LeadingAge Ziegler 200	11

Chapter 2

The Largest 200	14
A Quantitative Listing	14
Methodology	14
Key Findings	16

Chapter 3

Rankings	18
The LZ 200 Not-for-Profit Multi-site	
Senior Living Organization Rankings	18
Primary Rankings	22

Chapter 4

Analysis of the Data	58
Units	60
Communities	72
Locations	84
System Headquarters	90
Metropolitan Statistical Areas (MSAs)	93
Classifications	94
Corporate Name Changes	99
Ratings	103
Revenues	104
Corporate Staff	111
Accreditation	115
Staffing	118
Affiliation	121

Affordable Housing	125
Managed Units and Communities	127
Assisted and Skilled Composition	139
Home and Community-Based Services (HCBS)	142
Technology	148
Joint Ventures	156
Medicare Advantage Plan	159

Chapter 5

Growth and Change	160
Growth: The Largest 10 Systems	162
Pace of Growth: The Largest 25 Systems	173
Aggregate Growth	194
Future Growth Plans	198
Type of Growth by Organizations	202
Type of Growth by Communities	207
Growth by Expansion	219
Growth by New Communities	221
Growth by Merger/Acquisition/Affiliation	224
Growth by Disposition	227

Chapter 6

Additional Listings	230
Single-Campus Senior Living Communities	232
Largest Single-Campus Providers of HCBS	239
Technology Adoption: Largest Single-Campus Providers	240
Largest Individual Campuses	242
Systems by Total Market-Rate and Affordable Units	248

<i>Closing Thoughts</i>	<i>257</i>
-----------------------------------	------------

<i>Index</i>	<i>258</i>
------------------------	------------



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



A Note from LeadingAge

LeadingAge is pleased to partner with Ziegler to bring you the 18th edition of the LeadingAge Ziegler 200 ("LZ 200").

This publication is an eagerly anticipated annual report of the largest, most complex, not-for-profit senior living organizations. The 2021 report demonstrates the significant role that LeadingAge nonprofit member organizations play in the aging services sector. From the oldest to the newest, the largest to the smallest, each organization has a unique story that includes dedication, resilience, and a reputation for delivering quality care to the individuals and families they serve.

Today, LeadingAge members are addressing complex challenges like never before. Governing boards and senior leaders are engaging in thoughtful strategic planning to reposition, grow, change, partner, and innovate how their organizations achieve their missions. The following pages present a snapshot of the longstanding story of our members' resilient leadership, transformation, and good works. These organizations are committed to shared learning, sharing their stories to strengthen the field, and increase public understanding of the services and supports our sector provides.

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

At LeadingAge, we are committed to our role as the trusted voice for aging, and I thank you for your on-going interest in this report.

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

Katie Smith Sloan
President and CEO
LeadingAge





Ziegler

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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 18th edition of the LeadingAge Ziegler publication, compiling data from the largest 200 not-for-profit senior living providers in the country. LeadingAge has been the ideal partner for this research initiative and we look forward to seeing providers, industry professionals and key stakeholders take full advantage of the wealth of information this publication provides. This year's report highlighting the 200 largest not-for-profit providers, represents more than 300,000 market-rate units and 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. As always, if you have any questions or feedback regarding the publication, we encourage you to reach out to us.

Enjoy the 2021 LeadingAge Ziegler 200 publication!



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The LeadingAge Ziegler 200



History

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

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

The 2021 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, 2020**.

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.

¹2021 ranking data and amounts provided by Refinitiv as of 12/31/20.

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. Rankings for 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 2021 LZ 200 were provided and confirmed (“confirmation”) by 151 of the 200 organizations. Two 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 21,313 units to 366 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 2.4%, 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 67% 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, 45% 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 10% of the LZ 200 (1% less 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 222.



- **Technology ...** On average, 72% of the LZ 200 communities have adopted electronic point of care/point of service documentation systems and electronic health/medical records. Adoption is generally lower for health and wellness technologies, such as medication monitoring or telehealth remote monitoring; and care/case management and coordination reveals that 58% use this software. A category added in 2020, social connectedness/resident engagement, reveals that 66% use this technology; and 41% system providers utilize more advanced analytical tools. Due to the pandemic, two new categories were added to the technology portion of the survey: 51% implemented staff and resident screening, and 50% added infection control technologies.
- **Joint ventures and partnerships ...** Nearly 31% 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 less than the 34% reported in the 2020 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 41% in 2020. 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 2021 and 2020 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 2021 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations.

The 2021 Rank column displays the numerical ranking of each system according to its 12/31/20 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 2020 Rank shows the numerical ranking of the listed organization in last year’s publication (according to its 12/31/19 data) listing of the same type. The organizations that show “NR” (Not Ranked) were not included in the LZ 200 rankings for 2020. Also note that with the increase to the largest 200 in the 2020 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 12/31/2020.

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 12/31/20). The systems listed in the 2021 LZ 200 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/20. 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) 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 12/31/20). 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

2021 Rank	2020 Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses, Inc.	MA	21,313	18,525	1,635	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	9,563	6,728	1,133	1,702	26	26	0	0	0
4	5	Presbyterian Homes and Services	MN	8,579	4,555	2,524	1,500	52	16	33	0	3
5	4	Ascension Living	MO	8,129	2,124	1,203	4,802	48	2	5	3	38
6	7	HumanGood	CA	5,503	3,371	1,095	1,037	21	20	1	0	0
7	6	Trinity Health Senior Communities	MI	5,496	1,839	1,199	2,458	53	6	13	14	20
8	9	Lifespace Communities, Inc.	IA	5,234	3,652	599	983	15	15	0	0	0
9	8	Covenant Living Communities & Services	IL	5,203	3,357	870	976	18	13	3	1	1
10	10	Benedictine	MN	4,616	879	1,577	2,160	34	10	4	3	17
11	11	Westminster Communities of Florida	FL	4,150	2,841	528	781	13	10	3	0	0
12	12	Retirement Housing Foundation	CA	4,139	2,642	886	611	18	9	8	1	0
13	14	The Kendal Corporation	PA	3,693	2,450	736	507	13	11	1	0	1
14	17	Lutheran Senior Services	MO	3,691	1,826	763	1,102	11	9	0	1	1
15	13	Cassia	MN	3,670	522	1,512	1,636	50	0	5	28	17
16	16	Asbury Communities, Inc.	MD	3,579	2,148	522	909	8	8	0	0	0
17	15	Presbyterian Senior Living	PA	3,486	1,818	547	1,121	18	11	5	2	0
18	20	Pacific Retirement Services	OR	3,364	2,561	398	405	10	10	0	0	0
19	18	Ohio Living	OH	2,952	1,632	453	867	12	9	1	0	2
20	23	Otterbein SeniorLife	OH	2,921	1,215	635	1,071	17	8	0	0	9
21	19	The Carmelite System, Inc.	NY	2,898	51	498	2,349	15	1	0	3	11
22	21	Front Porch Communities and Services	CA	2,860	2,159	183	518	10	5	5	0	0
23	22	Concordia Lutheran Ministries	PA	2,796	996	1,137	663	14	6	0	6	2
24	24	Masonic Villages	PA	2,557	1,614	259	684	5	3	1	0	1
25	25	Springpoint Senior Living Inc.	NJ	2,534	1,735	308	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

2021 Rank	2020 Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				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	35	Transforming Age	WA	2,427	1,677	672	78	18	3	10	5	0
28	30	Shell Point Retirement Community	FL	2,245	1,447	449	349	2	2	0	0	0
29	31	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
30	29	Presbyterian Manors of Mid-America, Inc.	KS	2,180	893	537	750	15	14	0	1	0
31	28	Christian Care Companies	AZ	2,168	1,687	413	68	6	0	5	0	1
32	32	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
33	27	Diakon Lutheran Social Ministries	PA	2,072	763	414	895	8	8	0	0	0
34	33	Willow Valley Communities	PA	2,068	1,570	198	300	3	3	0	0	0
35	34	Homewood Retirement Centers, Inc.	MD	1,888	1,149	288	451	5	4	1	0	0
36	37	Greencroft Communities	IN	1,864	654	586	624	9	7	0	2	0
37	36	WesleyLife	IA	1,788	764	366	658	10	8	0	0	2
38	38	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
39	44	National Church Residences	OH	1,768	1,022	521	225	12	3	4	5	0
40	39	Bethesda Senior Living Communities	CO	1,738	111	1,627	0	18	0	2	16	0
41	51	United Church Homes, Inc.	OH	1,715	701	269	745	13	5	4	0	4
42	40	Franciscan Communities	IL	1,702	744	345	613	7	4	1	0	2
43	41	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	6	6	0	0	0
44	42	Loretto	NY	1,684	210	551	923	9	1	2	4	2
45	50	Eskaton	CA	1,659	393	780	486	13	1	1	8	3
46	43	Covenant Health	MA	1,636	0	364	1,272	13	0	0	4	9
47	49	BHI Senior Living, Inc.	IN	1,622	497	773	352	5	5	0	0	0
48	46	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
49	45	Hebrew SeniorLife	MA	1,584	655	115	814	4	2	1	0	1
50	53	Bethesda Health Group, Inc.	MO	1,523	727	78	718	12	0	6	2	4

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

2021 Rank	2020 Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	48	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
52	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
53	54	Mississippi Methodist Senior Services, Inc.	MS	1,423	753	350	320	12	2	8	0	2
54	55	Providence Life Services	IL	1,421	767	372	282	7	1	4	1	1
55	56	Presbyterian Homes	IL	1,411	833	237	341	4	3	1	0	0
56	47	Lutheran Life Communities	IL	1,402	408	310	684	5	4	0	0	1
57	61	Lutheran Services Carolinas	NC	1,368	341	295	732	9	1	1	1	6
58	58	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
59	59	Methodist Retirement Communities	TX	1,316	629	393	294	7	5	1	1	0
60	57	Covia Communities	CA	1,310	953	102	255	5	5	0	0	0
61	60	SantaFe Senior Living Inc.	FL	1,306	876	316	114	3	2	1	0	0
62	62	Presbyterian Villages of Michigan	MI	1,270	904	264	102	10	1	7	2	0
63	63	LifeSpire of Virginia	VA	1,268	756	285	227	4	4	0	0	0
64	64	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
65	117	National Lutheran Communities and Services	MD	1,251	697	245	309	4	2	1	1	0
66	66	Immanuel	NE	1,240	646	393	201	17	7	1	7	2
67	67	Wesley Enhanced Living	PA	1,235	646	229	360	6	5	0	1	0
68	65	American Baptist Homes of the Midwest	MN	1,220	359	272	589	7	5	0	0	2
69	68	UMRC and Porter Hills	MI	1,199	678	335	186	6	3	2	1	0
70	69	Holland Home	MI	1,198	751	288	159	6	2	0	2	2
71	71	Western Home Services Inc.	IA	1,193	596	314	283	5	2	2	0	1
72	70	SpiriTrust Lutheran	PA	1,182	549	289	344	6	5	1	0	0
73	86	Friendship Villages of St. Louis	MO	1,175	811	130	234	2	2	0	0	0
74	72	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
75	73	Eventide	MN	1,156	71	533	552	8	5	0	2	1

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

2021 Rank	2020 Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	78	United Methodist Homes	NY	1,134	437	271	426	4	3	0	1	0
77	77	Pinnacle Living	VA	1,127	544	393	190	5	5	0	0	0
78	75	Friendship Senior Options	IL	1,115	689	184	242	2	2	0	0	0
79	74	Ingleside	MD	1,112	832	157	123	3	3	0	0	0
80	76	Lutheran SeniorLife	PA	1,083	492	192	399	5	2	3	0	0
81	79	Walker Methodist	MN	1,075	0	748	327	9	0	0	8	1
82	111	Life Enriching Communities	OH	1,067	613	178	276	3	3	0	0	0
83	80	Lutheran Homes of South Carolina	SC	1,064	407	306	351	5	5	0	0	0
84	81	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	3	3	0	0	0
85	95	Christian Care Communities	KY	1,016	432	179	405	8	3	3	1	1
86	89	Baruch Senior Ministries	MI	1,002	0	1,002	0	24	0	0	24	0
87	85	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
88	83	Blue Skies of Texas	TX	984	728	129	127	2	2	0	0	0
89	84	Presbyterian Communities of South Carolina	SC	983	411	298	274	6	6	0	0	0
90	88	Liberty Lutheran Services	PA	978	443	318	217	5	4	0	1	0
91	87	The United Methodist Retirement Homes, Inc.	NC	975	659	114	202	3	3	0	0	0
92	82	Saint Therese	MN	965	467	133	365	5	3	0	1	1
93	92	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
94	93	Sequoia Living	CA	946	702	103	141	3	3	0	0	0
95	108	The RiverWoods Group	NH	940	681	172	87	3	3	0	0	0
96	94	Wesley	WA	930	592	154	184	3	2	1	0	0
97	96	Christian Living Communities	CO	930	427	311	192	6	3	0	3	0
98	97	St. John's	NY	916	403	38	475	4	0	1	1	2
99	98	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	3	2	1	0	0
100	99	Givens Communities	NC	900	681	89	130	2	2	0	0	0

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

2021 Rank	2020 Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	90	Haverland Carter Lifestyle Group	NM	890	410	373	107	4	2	0	2	0
102	100	Masonic Homes Kentucky	KY	888	450	151	287	3	2	1	0	0
103	101	United Methodist Communities	NJ	884	88	548	248	4	1	0	3	0
104	102	St. Andrew's Resources for Seniors System	MO	877	379	208	290	6	0	3	1	2
105	104	Menno Haven, Inc.	PA	868	506	202	160	2	2	0	0	0
106	103	Sun Health Services	AZ	867	637	115	115	3	3	0	0	0
107	105	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
108	115	Mather	IL	848	712	59	77	3	2	1	0	0
109	120	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
110	106	Living Branches	PA	839	459	237	143	3	2	0	1	0
111	107	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
112	109	Lutheran Social Ministries of Maryland	MD	822	637	70	115	2	2	0	0	0
113	173	Presbyterian Homes of Georgia	GA	814	330	149	335	3	3	0	0	0
114	112	LutherCare	PA	810	473	126	211	3	0	2	0	1
115	110	Landis Communities	PA	808	545	160	103	3	1	1	1	0
116	113	Messiah Lifeways	PA	808	441	183	184	2	1	1	0	0
117	NR	Methodist Homes of Alabama & Northwest Florida	AL	803	39	339	425	5	1	0	3	1
118	116	Wesley Willows	IL	802	546	165	91	2	1	1	0	0
119	114	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
120	91	Oakwood Lutheran Senior Ministries	WI	789	492	197	100	2	2	0	0	0
121	119	Sunnyside Communities	VA	783	494	155	134	3	3	0	0	0
122	129	Vista Prairie Communities	MN	783	100	683	0	9	0	0	9	0
123	130	The Moorings, Incorporated	FL	777	557	114	106	3	1	2	0	0
124	121	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
125	123	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0

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

2021 Rank	2020 Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	124	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
127	125	Samaritas	MI	761	293	120	348	5	1	2	0	2
128	126	Christian Care Centers, Inc.	TX	759	411	229	119	3	3	0	0	0
129	127	Brazos Presbyterian Homes	TX	747	425	121	201	3	3	0	0	0
130	128	Benevolent Corporation Cedar Community	WI	747	412	225	110	8	0	3	4	1
131	118	The Ohio Masonic Home	OH	732	302	266	164	3	2	1	0	0
132	163	Bethany Lutheran Homes, Inc.	WI	726	282	321	123	10	2	1	6	1
133	131	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
134	143	Episcopal SeniorLife Communities	NY	716	334	200	182	7	1	3	3	0
135	132	Morningside Ministries	TX	707	345	152	210	2	2	0	0	0
136	133	Christian Health fka Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
137	134	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
138	139	LifeStream Complete Senior Living, Inc.	AZ	694	369	158	167	4	1	2	1	0
139	137	Sunset Senior Communities	MI	681	304	263	114	4	0	2	1	1
140	136	The Wesley Communities	OH	678	338	234	106	3	1	2	0	0
141	146	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
142	138	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
143	152	St. John's United	MT	665	195	284	186	5	4	0	1	0
144	141	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
145	142	Baptist Homes Society	PA	653	326	138	189	2	1	0	0	1
146	135	Maple Knoll Communities, Inc.	OH	649	400	91	158	2	2	0	0	0
147	144	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
148	140	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
149	145	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
150	147	CRISTA Senior Living	WA	624	374	141	109	2	2	0	0	0

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

2021 Rank	2020 Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	148	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
152	149	Baptist Retirement Homes of North Carolina, Inc.	NC	597	262	134	201	4	2	0	1	1
153	151	Genacross Lutheran Services	OH	597	137	175	285	3	2	1	0	0
154	153	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
155	170	Lutheran Life Villages	IN	577	183	69	325	3	1	0	0	2
156	154	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
157	155	Friends Homes, Inc.	NC	568	359	100	109	2	2	0	0	0
158	157	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
159	158	Ebenezer Society	MN	567	0	320	247	8	0	0	5	3
160	159	Episcopal Communities & Services	CA	566	436	82	48	3	3	0	0	0
161	160	Bethel	NY	563	170	130	263	5	1	1	1	2
162	161	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
163	162	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
164	156	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
165	164	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
166	165	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
167	166	Medford Leas	NJ	536	393	119	24	2	1	1	0	0
168	167	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
169	169	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
170	171	Redstone Presbyterian SeniorCare	PA	521	310	134	77	7	0	3	3	1
171	NR	LindenGrove Communities	WI	511	0	258	253	4	4	0	0	0
172	172	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
173	168	Rockwood Retirement Communities	WA	505	346	94	65	2	2	0	0	0
174	174	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
175	175	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

2021 Rank	2020 Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	122	Lutheran Social Ministries of New Jersey, Inc.	NJ	493	270	114	109	2	1	0	0	1
177	176	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
178	177	Knute Nelson	MN	474	211	180	83	6	0	2	3	1
179	150	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
180	182	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
181	184	Allegheny Lutheran Social Ministries Inc.	PA	463	215	96	152	3	3	0	0	0
182	NR	The Lutheran Home and Harwood Place	WI	461	170	104	187	5	0	1	3	1
183	NR	Tabitha	NE	460	0	149	311	3	0	0	1	2
184	183	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
185	199	Good Shepherd Communities, Inc.	NY	457	192	99	166	3	1	0	0	2
186	178	St. Paul's Senior Services	CA	451	188	204	59	4	0	1	2	1
187	186	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
188	185	Beechwood Health Care Center, Inc.	NY	438	110	56	272	3	0	1	1	1
189	188	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
190	189	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
191	191	Skaalen Retirement Services	WI	419	229	99	91	8	0	4	3	1
192	193	A.G.Rhodes	GA	418	0	0	418	3	0	0	0	3
193	194	Community First Solutions	OH	409	180	101	128	3	2	0	0	1
194	195	SCBMA	SC	402	94	134	174	2	2	0	0	0
195	196	Clark Retirement Community, Inc.	MI	400	195	166	39	2	2	0	0	0
196	197	Saint Mary's Home of Erie	PA	393	26	148	219	6	1	1	2	2
197	192	Jewish Senior Life of Metropolitan Detroit	MI	384	290	94	0	3	0	2	1	0
198	190	Parker	NJ	372	0	60	312	5	0	0	1	4
199	>200	ACC Senior Services	CA	371	146	126	99	4	0	1	2	1
200	>200	Bethesda	MN	366	61	57	248	5	0	2	1	2

NR: Not Ranked in that year

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

2021 IL Rank	2020 IL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses, Inc.	MA	21,313	18,525	1,635	1,153	16	16	0	0	0
2	2	ACTS Retirement Services, Inc.	PA	9,563	6,728	1,133	1,702	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	8,579	4,555	2,524	1,500	52	16	33	0	3
5	5	Lifespace Communities, Inc.	IA	5,234	3,652	599	983	15	15	0	0	0
6	7	HumanGood	CA	5,503	3,371	1,095	1,037	21	20	1	0	0
7	6	Covenant Living Communities & Services	IL	5,203	3,357	870	976	18	13	3	1	1
8	8	Westminster Communities of Florida	FL	4,150	2,841	528	781	13	10	3	0	0
9	9	Retirement Housing Foundation	CA	4,139	2,642	886	611	18	9	8	1	0
10	11	Pacific Retirement Services	OR	3,364	2,561	398	405	10	10	0	0	0
11	10	The Kendal Corporation	PA	3,693	2,450	736	507	13	11	1	0	1
12	12	Front Porch Communities and Services	CA	2,860	2,159	183	518	10	5	5	0	0
13	13	Asbury Communities, Inc.	MD	3,579	2,148	522	909	8	8	0	0	0
14	14	Ascension Living	MO	8,129	2,124	1,203	4,802	48	2	5	3	38
15	20	Lutheran Senior Services	MO	3,691	1,826	763	1,102	11	9	0	1	1
16	15	Presbyterian Senior Living	PA	3,486	1,818	547	1,121	18	11	5	2	0
17	17	Trinity Health Senior Communities	MI	5,496	1,839	1,199	2,458	53	6	13	14	20
18	18	Springpoint Senior Living Inc.	NJ	2,534	1,735	308	491	9	8	0	0	1
19	16	Christian Care Companies	AZ	2,168	1,687	413	68	6	0	5	0	1
20	26	Transforming Age	WA	2,427	1,677	672	78	18	3	10	5	0
21	19	Ohio Living	OH	2,952	1,632	453	867	12	9	1	0	2
22	21	Masonic Villages	PA	2,557	1,614	259	684	5	3	1	0	1
23	22	Willow Valley Communities	PA	2,068	1,570	198	300	3	3	0	0	0
24	23	Shell Point Retirement Community	FL	2,245	1,447	449	349	2	2	0	0	0
25	25	Otterbein SeniorLife	OH	2,921	1,215	635	1,071	17	8	0	0	9

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

2021 IL Rank	2020 IL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	24	Homewood Retirement Centers, Inc.	MD	1,888	1,149	288	451	5	4	1	0	0
27	35	National Church Residences	OH	1,768	1,022	521	225	12	3	4	5	0
28	27	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	6	6	0	0	0
29	28	Concordia Lutheran Ministries	PA	2,796	996	1,137	663	14	6	0	6	2
30	29	Covia Communities	CA	1,310	953	102	255	5	5	0	0	0
31	30	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
32	33	Presbyterian Villages of Michigan	MI	1,270	904	264	102	10	1	7	2	0
33	32	Presbyterian Manors of Mid-America, Inc.	KS	2,180	893	537	750	15	14	0	1	0
34	46	Benedictine	MN	4,616	879	1,577	2,160	34	10	4	3	17
35	34	SantaFe Senior Living Inc.	FL	1,306	876	316	114	3	2	1	0	0
36	36	Presbyterian Homes	IL	1,411	833	237	341	4	3	1	0	0
37	37	Ingleside	MD	1,112	832	157	123	3	3	0	0	0
38	50	Friendship Villages of St. Louis	MO	1,175	811	130	234	2	2	0	0	0
39	40	Providence Life Services	IL	1,421	767	372	282	7	1	4	1	1
40	38	WesleyLife	IA	1,788	764	366	658	10	8	0	0	2
41	31	Diakon Lutheran Social Ministries	PA	2,072	763	414	895	8	8	0	0	0
42	41	LifeSpire of Virginia	VA	1,268	756	285	227	4	4	0	0	0
43	39	Mississippi Methodist Senior Services, Inc.	MS	1,423	753	350	320	12	2	8	0	2
44	42	Holland Home	MI	1,198	751	288	159	6	2	0	2	2
45	43	Franciscan Communities	IL	1,702	744	345	613	7	4	1	0	2
46	44	Blue Skies of Texas	TX	984	728	129	127	2	2	0	0	0
47	45	Bethesda Health Group, Inc.	MO	1,523	727	78	718	12	0	6	2	4
48	54	Mather	IL	848	712	59	77	3	2	1	0	0
49	47	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	3	3	0	0	0
50	48	Sequoia Living	CA	946	702	103	141	3	3	0	0	0

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

2021 IL Rank	2020 IL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	89	United Church Homes, Inc.	OH	1,715	701	269	745	13	5	4	0	4
52	93	National Lutheran Communities and Services	MD	1,251	697	245	309	4	2	1	1	0
53	49	Friendship Senior Options	IL	1,115	689	184	242	2	2	0	0	0
54	63	The RiverWoods Group	NH	940	681	172	87	3	3	0	0	0
55	53	Givens Communities	NC	900	681	89	130	2	2	0	0	0
56	51	UMRC and Porter Hills	MI	1,199	678	335	186	6	3	2	1	0
57	52	The United Methodist Retirement Homes, Inc.	NC	975	659	114	202	3	3	0	0	0
58	55	Hebrew SeniorLife	MA	1,584	655	115	814	4	2	1	0	1
59	57	Greencroft Communities	IN	1,864	654	586	624	9	7	0	2	0
60	56	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
61	58	Immanuel	NE	1,240	646	393	201	17	7	1	7	2
62	62	Wesley Enhanced Living	PA	1,235	646	229	360	6	5	0	1	0
63	60	Sun Health Services	AZ	867	637	115	115	3	3	0	0	0
64	59	Lutheran Social Ministries of Maryland	MD	822	637	70	115	2	2	0	0	0
65	61	Methodist Retirement Communities	TX	1,316	629	393	294	7	5	1	1	0
66	69	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
67	74	Life Enriching Communities	OH	1,067	613	178	276	3	3	0	0	0
68	65	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
69	67	Western Home Services Inc.	IA	1,193	596	314	283	5	2	2	0	1
70	66	Wesley	WA	930	592	154	184	3	2	1	0	0
71	68	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
72	78	The Moorings, Incorporated	FL	777	557	114	106	3	1	2	0	0
73	70	SpiriTrust Lutheran	PA	1,182	549	289	344	6	5	1	0	0
74	72	Wesley Willows	IL	802	546	165	91	2	1	1	0	0
75	71	Landis Communities	PA	808	545	160	103	3	1	1	1	0

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

2021 IL Rank	2020 IL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	77	Pinnacle Living	VA	1,127	544	393	190	5	5	0	0	0
77	73	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
78	75	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
79	76	Cassia	MN	3,670	522	1,512	1,636	50	0	5	28	17
80	94	Menno Haven, Inc.	PA	868	506	202	160	2	2	0	0	0
81	83	BHI Senior Living, Inc.	IN	1,622	497	773	352	5	5	0	0	0
82	79	Sunnyside Communities	VA	783	494	155	134	3	3	0	0	0
83	80	Lutheran SeniorLife	PA	1,083	492	192	399	5	2	3	0	0
84	64	Oakwood Lutheran Senior Ministries	WI	789	492	197	100	2	2	0	0	0
85	82	LutherCare	PA	810	473	126	211	3	0	2	0	1
86	81	Saint Therese	MN	965	467	133	365	5	3	0	1	1
87	85	Living Branches	PA	839	459	237	143	3	2	0	1	0
88	86	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
89	87	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
90	88	Masonic Homes Kentucky	KY	888	450	151	287	3	2	1	0	0
91	91	Liberty Lutheran Services	PA	978	443	318	217	5	4	0	1	0
92	90	Messiah Lifeways	PA	808	441	183	184	2	1	1	0	0
93	106	United Methodist Homes	NY	1,134	437	271	426	4	3	0	1	0
94	92	Episcopal Communities & Services	CA	566	436	82	48	3	3	0	0	0
95	119	Christian Care Communities	KY	1,016	432	179	405	8	3	3	1	1
96	84	Christian Living Communities	CO	930	427	311	192	6	3	0	3	0
97	95	Brazos Presbyterian Homes	TX	747	425	121	201	3	3	0	0	0
98	99	Benevolent Corporation Cedar Community	WI	747	412	225	110	8	0	3	4	1
99	97	Presbyterian Communities of South Carolina	SC	983	411	298	274	6	6	0	0	0
100	98	Christian Care Centers, Inc.	TX	759	411	229	119	3	3	0	0	0

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

2021 IL Rank	2020 IL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	96	Haverland Carter Lifestyle Group	NM	890	410	373	107	4	2	0	2	0
102	100	Lutheran Life Communities	IL	1,402	408	310	684	5	4	0	0	1
103	101	Lutheran Homes of South Carolina	SC	1,064	407	306	351	5	5	0	0	0
104	102	St. John's	NY	916	403	38	475	4	0	1	1	2
105	107	Maple Knoll Communities, Inc.	OH	649	400	91	158	2	2	0	0	0
106	103	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
107	104	Eskaton	CA	1,659	393	780	486	13	1	1	8	3
108	105	Medford Leas	NJ	536	393	119	24	2	1	1	0	0
109	109	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	0	3	1	2
111	113	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
112	114	CRISTA Senior Living	WA	624	374	141	109	2	2	0	0	0
113	115	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
114	116	LifeStream Complete Senior Living, Inc.	AZ	694	369	158	167	4	1	2	1	0
115	118	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
116	120	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
117	108	American Baptist Homes of the Midwest	MN	1,220	359	272	589	7	5	0	0	2
118	123	Friends Homes, Inc.	NC	568	359	100	109	2	2	0	0	0
119	124	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
120	117	Rockwood Retirement Communities	WA	505	346	94	65	2	2	0	0	0
121	125	Morningside Ministries	TX	707	345	152	210	2	2	0	0	0
122	134	Lutheran Services Carolinas	NC	1,368	341	295	732	9	1	1	1	6
123	126	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
124	127	The Wesley Communities	OH	678	338	234	106	3	1	2	0	0
125	128	Episcopal SeniorLife Communities	NY	716	334	200	182	7	1	3	3	0

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

2021 IL Rank	2020 IL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	179	Presbyterian Homes of Georgia	GA	814	330	149	335	3	3	0	0	0
127	129	Christian Health fka Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
128	130	Baptist Homes Society	PA	653	326	138	189	2	1	0	0	1
129	132	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
130	131	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
131	133	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
132	135	Redstone Presbyterian SeniorCare	PA	521	310	134	77	7	0	3	3	1
133	136	Sunset Senior Communities	MI	681	304	263	114	4	0	2	1	1
134	111	The Ohio Masonic Home	OH	732	302	266	164	3	2	1	0	0
135	137	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
136	138	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	3	2	1	0	0
137	139	Samaritas	MI	761	293	120	348	5	1	2	0	2
138	140	Jewish Senior Life of Metropolitan Detroit	MI	384	290	94	0	3	0	2	1	0
139	112	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
140	165	Bethany Lutheran Homes, Inc.	WI	726	282	321	123	10	2	1	6	1
141	141	Lutheran Social Ministries of New Jersey, Inc.	NJ	493	270	114	109	2	1	0	0	1
142	142	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
143	143	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
144	144	Baptist Retirement Homes of North Carolina, Inc.	NC	597	262	134	201	4	2	0	1	1
145	145	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
146	146	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
147	147	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
148	148	Skaalen Retirement Services	WI	419	229	99	91	8	0	4	3	1
149	149	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
150	150	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0

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

2021 IL Rank	2020 IL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	154	Allegheny Lutheran Social Ministries Inc.	PA	463	215	96	152	3	3	0	0	0
152	151	Knute Nelson	MN	474	211	180	83	6	0	2	3	1
153	152	Loretto	NY	1,684	210	551	923	9	1	2	4	2
154	153	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
155	169	St. John's United	MT	665	195	284	186	5	4	0	1	0
156	155	Clark Retirement Community, Inc.	MI	400	195	166	39	2	2	0	0	0
157	156	Good Shepherd Communities, Inc.	NY	457	192	99	166	3	1	0	0	2
158	157	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
159	175	St. Paul's Senior Services	CA	451	188	204	59	4	0	1	2	1
160	158	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
161	173	Lutheran Life Villages	IN	577	183	69	325	3	1	0	0	2
162	178	Community First Solutions	OH	409	180	101	128	3	2	0	0	1
163	160	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
164	162	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
165	164	Bethel	NY	563	170	130	263	5	1	1	1	2
166	NR	The Lutheran Home and Harwood Place	WI	461	170	104	187	5	0	1	3	1
167	166	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
168	167	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
169	168	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
170	>200	ACC Senior Services	CA	371	146	126	99	4	0	1	2	1
171	171	Genacross Lutheran Services	OH	597	137	175	285	3	2	1	0	0
172	172	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
173	174	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
174	177	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
175	178	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2

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

2021 IL Rank	2020 IL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	180	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
177	181	Bethesda Senior Living Communities	CO	1,738	111	1,627	0	18	0	2	16	0
178	182	Beechwood Health Care Center, Inc.	NY	438	110	56	272	3	0	1	1	1
179	183	Vista Prairie Communities	MN	783	100	683	0	9	0	0	9	0
180	184	SCBMA	SC	402	94	134	174	2	2	0	0	0
181	185	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
182	186	United Methodist Communities	NJ	884	88	548	248	4	1	0	3	0
183	187	Eventide	MN	1,156	71	533	552	8	5	0	2	1
184	188	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
185	>200	Bethesda	MN	366	61	57	248	5	0	2	1	2
186	170	The Carmelite System, Inc.	NY	2,898	51	498	2,349	15	1	0	3	11
187	NR	Methodist Homes of Alabama & Northwest Florida	AL	803	39	339	425	5	1	0	3	1
188	189	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
189	191	Saint Mary's Home of Erie	PA	393	26	148	219	6	1	1	2	2
190	192	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
191	193	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
192	195	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
193	196	Covenant Health	MA	1,636	0	364	1,272	13	0	0	4	9
194	197	Walker Methodist	MN	1,075	0	748	327	9	0	0	8	1
195	194	Baruch Senior Ministries	MI	1,002	0	1,002	0	24	0	0	24	0
196	198	Ebenezer Society	MN	567	0	320	247	8	0	0	5	3
197	NR	LindenGrove Communities	WI	511	0	258	253	4	4	0	0	0
198	NR	Tabitha	NE	460	0	149	311	3	0	0	1	2
199	200	A.G.Rhodes	GA	418	0	0	418	3	0	0	0	3
200	199	Parker	NJ	372	0	60	312	5	0	0	1	4

NR: Not Ranked in that year

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

2021 AL Rank	2020 AL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	Presbyterian Homes and Services	MN	8,579	4,555	2,524	1,500	52	16	33	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	4	National Senior Campuses, Inc.	MA	21,313	18,525	1,635	1,153	16	16	0	0	0
4	3	Bethesda Senior Living Communities	CO	1,738	111	1,627	0	18	0	2	16	0
5	6	Benedictine	MN	4,616	879	1,577	2,160	34	10	4	3	17
6	5	Cassia	MN	3,670	522	1,512	1,636	50	0	5	28	17
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	9	Trinity Health Senior Communities	MI	5,496	1,839	1,199	2,458	53	6	13	14	20
10	10	Concordia Lutheran Ministries	PA	2,796	996	1,137	663	14	6	0	6	2
11	11	ACTS Retirement Services, Inc.	PA	9,563	6,728	1,133	1,702	26	26	0	0	0
12	12	HumanGood	CA	5,503	3,371	1,095	1,037	21	20	1	0	0
13	13	Baruch Senior Ministries	MI	1,002	0	1,002	0	24	0	0	24	0
14	16	Retirement Housing Foundation	CA	4,139	2,642	886	611	18	9	8	1	0
15	15	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
16	14	Covenant Living Communities & Services	IL	5,203	3,357	870	976	18	13	3	1	1
17	21	Eskaton	CA	1,659	393	780	486	13	1	1	8	3
18	20	BHI Senior Living, Inc.	IN	1,622	497	773	352	5	5	0	0	0
19	19	Lutheran Senior Services	MO	3,691	1,826	763	1,102	11	9	0	1	1
20	18	Walker Methodist	MN	1,075	0	748	327	9	0	0	8	1
21	23	The Kendal Corporation	PA	3,693	2,450	736	507	13	11	1	0	1
22	22	Vista Prairie Communities	MN	783	100	683	0	9	0	0	9	0
23	17	Transforming Age	WA	2,427	1,677	672	78	18	3	10	5	0
24	36	Otterbein SeniorLife	OH	2,921	1,215	635	1,071	17	8	0	0	9
25	30	Lifespace Communities, Inc.	IA	5,234	3,652	599	983	15	15	0	0	0

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

2021 AL Rank	2020 AL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	24	Greencroft Communities	IN	1,864	654	586	624	9	7	0	2	0
27	27	Loretto	NY	1,684	210	551	923	9	1	2	4	2
28	29	United Methodist Communities	NJ	884	88	548	248	4	1	0	3	0
29	28	Presbyterian Senior Living	PA	3,486	1,818	547	1,121	18	11	5	2	0
30	26	Presbyterian Manors of Mid-America, Inc.	KS	2,180	893	537	750	15	14	0	1	0
31	37	Eventide	MN	1,156	71	533	552	8	5	0	2	1
32	33	Westminster Communities of Florida	FL	4,150	2,841	528	781	13	10	3	0	0
33	31	Asbury Communities, Inc.	MD	3,579	2,148	522	909	8	8	0	0	0
34	34	National Church Residences	OH	1,768	1,022	521	225	12	3	4	5	0
35	35	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
36	41	The Carmelite System, Inc.	NY	2,898	51	498	2,349	15	1	0	3	11
37	38	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
38	25	Ohio Living	OH	2,952	1,632	453	867	12	9	1	0	2
39	39	Shell Point Retirement Community	FL	2,245	1,447	449	349	2	2	0	0	0
40	32	Diakon Lutheran Social Ministries	PA	2,072	763	414	895	8	8	0	0	0
41	42	Christian Care Companies	AZ	2,168	1,687	413	68	6	0	5	0	1
42	46	Pacific Retirement Services	OR	3,364	2,561	398	405	10	10	0	0	0
43	43	Immanuel	NE	1,240	646	393	201	17	7	1	7	2
44	44	Methodist Retirement Communities	TX	1,316	629	393	294	7	5	1	1	0
45	45	Pinnacle Living	VA	1,127	544	393	190	5	5	0	0	0
46	40	Haverland Carter Lifestyle Group	NM	890	410	373	107	4	2	0	2	0
47	48	Providence Life Services	IL	1,421	767	372	282	7	1	4	1	1
48	47	WesleyLife	IA	1,788	764	366	658	10	8	0	0	2
49	49	Covenant Health	MA	1,636	0	364	1,272	13	0	0	4	9
50	53	Mississippi Methodist Senior Services, Inc.	MS	1,423	753	350	320	12	2	8	0	2

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

2021 AL Rank	2020 AL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	51	Franciscan Communities	IL	1,702	744	345	613	7	4	1	0	2
52	52	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	6	6	0	0	0
53	NR	Methodist Homes of Alabama & Northwest Florida	AL	803	39	339	425	5	1	0	3	1
54	54	UMRC and Porter Hills	MI	1,199	678	335	186	6	3	2	1	0
55	55	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
56	85	Bethany Lutheran Homes, Inc.	WI	726	282	321	123	10	2	1	6	1
57	56	Ebenezer Society	MN	567	0	320	247	8	0	0	5	3
58	57	Liberty Lutheran Services	PA	978	443	318	217	5	4	0	1	0
59	59	SantaFe Senior Living Inc.	FL	1,306	876	316	114	3	2	1	0	0
60	61	Western Home Services Inc.	IA	1,193	596	314	283	5	2	2	0	1
61	62	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
62	76	Christian Living Communities	CO	930	427	311	192	6	3	0	3	0
63	50	Lutheran Life Communities	IL	1,402	408	310	684	5	4	0	0	1
64	63	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
65	58	Springpoint Senior Living Inc.	NJ	2,534	1,735	308	491	9	8	0	0	1
66	64	Lutheran Homes of South Carolina	SC	1,064	407	306	351	5	5	0	0	0
67	60	Presbyterian Communities of South Carolina	SC	983	411	298	274	6	6	0	0	0
68	65	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
69	79	Lutheran Services Carolinas	NC	1,368	341	295	732	9	1	1	1	6
70	66	SpiriTrust Lutheran	PA	1,182	549	289	344	6	5	1	0	0
71	67	Homewood Retirement Centers, Inc.	MD	1,888	1,149	288	451	5	4	1	0	0
72	68	Holland Home	MI	1,198	751	288	159	6	2	0	2	2
73	70	LifeSpire of Virginia	VA	1,268	756	285	227	4	4	0	0	0
74	81	St. John's United	MT	665	195	284	186	5	4	0	1	0
75	84	American Baptist Homes of the Midwest	MN	1,220	359	272	589	7	5	0	0	2

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

2021 AL Rank	2020 AL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	72	United Methodist Homes	NY	1,134	437	271	426	4	3	0	1	0
77	72	United Church Homes, Inc.	OH	1,715	701	269	745	13	5	4	0	4
78	73	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
79	87	The Ohio Masonic Home	OH	732	302	266	164	3	2	1	0	0
80	74	Presbyterian Villages of Michigan	MI	1,270	904	264	102	10	1	7	2	0
81	75	Sunset Senior Communities	MI	681	304	263	114	4	0	2	1	1
82	77	Masonic Villages	PA	2,557	1,614	259	684	5	3	1	0	1
83	78	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
84	NR	LindenGrove Communities	WI	511	0	258	253	4	4	0	0	0
85	80	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
86	82	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
87	83	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
88	104	National Lutheran Communities and Services	MD	1,251	697	245	309	4	2	1	1	0
89	88	Presbyterian Homes	IL	1,411	833	237	341	4	3	1	0	0
90	89	Living Branches	PA	839	459	237	143	3	2	0	1	0
91	90	The Wesley Communities	OH	678	338	234	106	3	1	2	0	0
92	86	Wesley Enhanced Living	PA	1,235	646	229	360	6	5	0	1	0
93	91	Christian Care Centers, Inc.	TX	759	411	229	119	3	3	0	0	0
94	92	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
95	93	Benevolent Corporation Cedar Community	WI	747	412	225	110	8	0	3	4	1
96	94	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
97	97	St. Andrew's Resources for Seniors System	MO	877	379	208	290	6	0	3	1	2
98	120	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
99	69	St. Paul's Senior Services	CA	451	188	204	59	4	0	1	2	1
100	106	Menno Haven, Inc.	PA	868	506	202	160	2	2	0	0	0

NR: Not Ranked in that year

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

2021 AL Rank	2020 AL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	139	Episcopal SeniorLife Communities	NY	716	334	200	182	7	1	3	3	0
102	96	Willow Valley Communities	PA	2,068	1,570	198	300	3	3	0	0	0
103	95	Oakwood Lutheran Senior Ministries	WI	789	492	197	100	2	2	0	0	0
104	98	Lutheran SeniorLife	PA	1,083	492	192	399	5	2	3	0	0
105	99	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
106	100	Friendship Senior Options	IL	1,115	689	184	242	2	2	0	0	0
107	101	Front Porch Communities and Services	CA	2,860	2,159	183	518	10	5	5	0	0
108	102	Messiah Lifeways	PA	808	441	183	184	2	1	1	0	0
109	105	Knute Nelson	MN	474	211	180	83	6	0	2	3	1
110	115	Christian Care Communities	KY	1,016	432	179	405	8	3	3	1	1
111	134	Life Enriching Communities	OH	1,067	613	178	276	3	3	0	0	0
112	107	Genacross Lutheran Services	OH	597	137	175	285	3	2	1	0	0
113	145	The RiverWoods Group	NH	940	681	172	87	3	3	0	0	0
114	108	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
115	110	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
116	111	Clark Retirement Community, Inc.	MI	400	195	166	39	2	2	0	0	0
117	109	Wesley Willows	IL	802	546	165	91	2	1	1	0	0
118	114	Landis Communities	PA	808	545	160	103	3	1	1	1	0
119	131	LifeStream Complete Senior Living, Inc.	AZ	694	369	158	167	4	1	2	1	0
120	116	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
121	117	Ingleside	MD	1,112	832	157	123	3	3	0	0	0
122	119	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
123	118	Sunnyside Communities	VA	783	494	155	134	3	3	0	0	0
124	121	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
125	122	Wesley	WA	930	592	154	184	3	2	1	0	0

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

2021 AL Rank	2020 AL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	123	Morningside Ministries	TX	707	345	152	210	2	2	0	0	0
127	124	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
128	125	Masonic Homes Kentucky	KY	888	450	151	287	3	2	1	0	0
129	175	Presbyterian Homes of Georgia	GA	814	330	149	335	3	3	0	0	0
130	NR	Tabitha	NE	460	0	149	311	3	0	0	1	2
131	126	Saint Mary's Home of Erie	PA	393	26	148	219	6	1	1	2	2
132	127	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
133	130	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
134	128	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
135	129	CRISTA Senior Living	WA	624	374	141	109	2	2	0	0	0
136	132	Baptist Homes Society	PA	653	326	138	189	2	1	0	0	1
137	135	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
138	136	Redstone Presbyterian SeniorCare	PA	521	310	134	77	7	0	3	3	1
139	133	Baptist Retirement Homes of North Carolina, Inc.	NC	597	262	134	201	4	2	0	1	1
140	137	SCBMA	SC	402	94	134	174	2	2	0	0	0
141	138	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	3	3	0	0	0
142	144	Saint Therese	MN	965	467	133	365	5	3	0	1	1
143	176	Friendship Villages of St. Louis	MO	1,175	811	130	234	2	2	0	0	0
144	141	Bethel	NY	563	170	130	263	5	1	1	1	2
145	142	Blue Skies of Texas	TX	984	728	129	127	2	2	0	0	0
146	143	LutherCare	PA	810	473	126	211	3	0	2	0	1
147	>200	ACC Senior Services	CA	371	146	126	99	4	0	1	2	1
148	146	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
149	147	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
150	148	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0

NR: Not Ranked in that year

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

2021 AL Rank	2020 AL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	149	Brazos Presbyterian Homes	TX	747	425	121	201	3	3	0	0	0
152	150	Samaritas	MI	761	293	120	348	5	1	2	0	2
153	152	Medford Leas	NJ	536	393	119	24	2	1	1	0	0
154	151	Hebrew SeniorLife	MA	1,584	655	115	814	4	2	1	0	1
155	154	Sun Health Services	AZ	867	637	115	115	3	3	0	0	0
156	153	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
157	157	The United Methodist Retirement Homes, Inc.	NC	975	659	114	202	3	3	0	0	0
158	155	The Moorings, Incorporated	FL	777	557	114	106	3	1	2	0	0
159	103	Lutheran Social Ministries of New Jersey, Inc.	NJ	493	270	114	109	2	1	0	0	1
160	158	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
161	177	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
162	NR	The Lutheran Home and Harwood Place	WI	461	170	104	187	5	0	1	3	1
163	160	Sequoia Living	CA	946	702	103	141	3	3	0	0	0
164	163	Covia Communities	CA	1,310	953	102	255	5	5	0	0	0
165	162	Community First Solutions	OH	409	180	101	128	3	2	0	0	1
166	164	Friends Homes, Inc.	NC	568	359	100	109	2	2	0	0	0
167	161	Skaalen Retirement Services	WI	419	229	99	91	8	0	4	3	1
168	159	Good Shepherd Communities, Inc.	NY	457	192	99	166	3	1	0	0	2
169	166	Allegheny Lutheran Social Ministries Inc.	PA	463	215	96	152	3	3	0	0	0
170	167	Rockwood Retirement Communities	WA	505	346	94	65	2	2	0	0	0
171	140	Jewish Senior Life of Metropolitan Detroit	MI	384	290	94	0	3	0	2	1	0
172	171	Maple Knoll Communities, Inc.	OH	649	400	91	158	2	2	0	0	0
173	172	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
174	173	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
175	170	Givens Communities	NC	900	681	89	130	2	2	0	0	0

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

2021 AL Rank	2020 AL Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	174	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
177	178	Episcopal Communities & Services	CA	566	436	82	48	3	3	0	0	0
178	179	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
179	180	Christian Health fka Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
180	182	Bethesda Health Group, Inc.	MO	1,523	727	78	718	12	0	6	2	4
181	183	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	3	2	1	0	0
182	185	Lutheran Social Ministries of Maryland	MD	822	637	70	115	2	2	0	0	0
183	184	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
184	186	Lutheran Life Villages	IN	577	183	69	325	3	1	0	0	2
185	188	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
186	189	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
187	181	Parker	NJ	372	0	60	312	5	0	0	1	4
188	190	Mather	IL	848	712	59	77	3	2	1	0	0
189	191	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
190	192	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
191	193	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
192	>200	Bethesda	MN	366	61	57	248	5	0	2	1	2
193	187	Beechwood Health Care Center, Inc.	NY	438	110	56	272	3	0	1	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	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

2021 NCB Rank	2020 NCB Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				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	5,496	1,839	1,199	2,458	53	6	13	14	20
4	4	The Carmelite System, Inc.	NY	2,898	51	498	2,349	15	1	0	3	11
5	5	Benedictine	MN	4,616	879	1,577	2,160	34	10	4	3	17
6	8	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
7	7	ACTS Retirement Services, Inc.	PA	9,563	6,728	1,133	1,702	26	26	0	0	0
8	6	Cassia	MN	3,670	522	1,512	1,636	50	0	5	28	17
9	10	Presbyterian Homes and Services	MN	8,579	4,555	2,524	1,500	52	16	33	0	3
10	9	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
11	11	Covenant Health	MA	1,636	0	364	1,272	13	0	0	4	9
12	12	National Senior Campuses, Inc.	MA	21,313	18,525	1,635	1,153	16	16	0	0	0
13	13	Presbyterian Senior Living	PA	3,486	1,818	547	1,121	18	11	5	2	0
14	14	Lutheran Senior Services	MO	3,691	1,826	763	1,102	11	9	0	1	1
15	16	Otterbein SeniorLife	OH	2,921	1,215	635	1,071	17	8	0	0	9
16	15	HumanGood	CA	5,503	3,371	1,095	1,037	21	20	1	0	0
17	17	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
18	19	Lifespace Communities, Inc.	IA	5,234	3,652	599	983	15	15	0	0	0
19	20	Covenant Living Communities & Services	IL	5,203	3,357	870	976	18	13	3	1	1
20	22	Loretto	NY	1,684	210	551	923	9	1	2	4	2
21	23	Asbury Communities, Inc.	MD	3,579	2,148	522	909	8	8	0	0	0
22	21	Diakon Lutheran Social Ministries	PA	2,072	763	414	895	8	8	0	0	0
23	18	Ohio Living	OH	2,952	1,632	453	867	12	9	1	0	2
24	24	Hebrew SeniorLife	MA	1,584	655	115	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

2021 NCB Rank	2020 NCB Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				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	28	Westminster Communities of Florida	FL	4,150	2,841	528	781	13	10	3	0	0
28	29	Presbyterian Manors of Mid-America, Inc.	KS	2,180	893	537	750	15	14	0	1	0
29	30	United Church Homes, Inc.	OH	1,715	701	269	745	13	5	4	0	4
30	31	Lutheran Services Carolinas	NC	1,368	341	295	732	9	1	1	1	6
31	37	Bethesda Health Group, Inc.	MO	1,523	727	78	718	12	0	6	2	4
32	32	Masonic Villages	PA	2,557	1,614	259	684	5	3	1	0	1
33	27	Lutheran Life Communities	IL	1,402	408	310	684	5	4	0	0	1
34	33	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
35	34	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
36	35	Concordia Lutheran Ministries	PA	2,796	996	1,137	663	14	6	0	6	2
37	36	WesleyLife	IA	1,788	764	366	658	10	8	0	0	2
38	40	Greencroft Communities	IN	1,864	654	586	624	9	7	0	2	0
39	38	Franciscan Communities	IL	1,702	744	345	613	7	4	1	0	2
40	39	Retirement Housing Foundation	CA	4,139	2,642	886	611	18	9	8	1	0
41	41	American Baptist Homes of the Midwest	MN	1,220	359	272	589	7	5	0	0	2
42	42	Eventide	MN	1,156	71	533	552	8	5	0	2	1
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	913	296	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	3,693	2,450	736	507	13	11	1	0	1
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

2021 NCB Rank	2020 NCB Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	51	Springpoint Senior Living Inc.	NJ	2,534	1,735	308	491	9	8	0	0	1
52	55	Eskaton	CA	1,659	393	780	486	13	1	1	8	3
53	52	St. John's	NY	916	403	38	475	4	0	1	1	2
54	53	Homewood Retirement Centers, Inc.	MD	1,888	1,149	288	451	5	4	1	0	0
55	56	United Methodist Homes	NY	1,134	437	271	426	4	3	0	1	0
56	NR	Methodist Homes of Alabama & Northwest Florida	AL	803	39	339	425	5	1	0	3	1
57	57	A.G.Rhodes	GA	418	0	0	418	3	0	0	0	3
58	60	Pacific Retirement Services	OR	3,364	2,561	398	405	10	10	0	0	0
59	59	Christian Care Communities	KY	1,016	432	179	405	8	3	3	1	1
60	54	Lutheran SeniorLife	PA	1,083	492	192	399	5	2	3	0	0
61	61	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
62	62	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
63	58	Saint Therese	MN	965	467	133	365	5	3	0	1	1
64	63	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
65	64	Wesley Enhanced Living	PA	1,235	646	229	360	6	5	0	1	0
66	65	BHI Senior Living, Inc.	IN	1,622	497	773	352	5	5	0	0	0
67	66	Lutheran Homes of South Carolina	SC	1,064	407	306	351	5	5	0	0	0
68	67	Shell Point Retirement Community	FL	2,245	1,447	449	349	2	2	0	0	0
69	68	Samaritas	MI	761	293	120	348	5	1	2	0	2
70	69	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
71	71	SpiriTrust Lutheran	PA	1,182	549	289	344	6	5	1	0	0
72	72	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
73	73	Presbyterian Homes	IL	1,411	833	237	341	4	3	1	0	0
74	74	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
75	84	Presbyterian Homes of Georgia	GA	814	330	149	335	3	3	0	0	0

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

2021 NCB Rank	2020 NCB Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	75	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
77	76	Walker Methodist	MN	1,075	0	748	327	9	0	0	8	1
78	77	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	6	6	0	0	0
79	78	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
80	79	Lutheran Life Villages	IN	577	183	69	325	3	1	0	0	2
81	80	Mississippi Methodist Senior Services, Inc.	MS	1,423	753	350	320	12	2	8	0	2
82	70	Parker	NJ	372	0	60	312	5	0	0	1	4
83	NR	Tabitha	NE	460	0	149	311	3	0	0	1	2
84	134	National Lutheran Communities and Services	MD	1,251	697	245	309	4	2	1	1	0
85	89	Willow Valley Communities	PA	2,068	1,570	198	300	3	3	0	0	0
86	83	Christian Health fka Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
87	85	Methodist Retirement Communities	TX	1,316	629	393	294	7	5	1	1	0
88	86	St. Andrew's Resources for Seniors System	MO	877	379	208	290	6	0	3	1	2
89	87	Masonic Homes Kentucky	KY	888	450	151	287	3	2	1	0	0
90	88	Genacross Lutheran Services	OH	597	137	175	285	3	2	1	0	0
91	90	Western Home Services Inc.	IA	1,193	596	314	283	5	2	2	0	1
92	91	Providence Life Services	IL	1,421	767	372	282	7	1	4	1	1
93	92	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
94	147	Life Enriching Communities	OH	1,067	613	178	276	3	3	0	0	0
95	93	Presbyterian Communities of South Carolina	SC	983	411	298	274	6	6	0	0	0
96	95	Beechwood Health Care Center, Inc.	NY	438	110	56	272	3	0	1	1	1
97	96	Bethel	NY	563	170	130	263	5	1	1	1	2
98	94	Sholom Community Alliance	MN	552	153	142	257	5	0	1	2	2
99	97	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
100	82	Covia Communities	CA	1,310	953	102	255	5	5	0	0	0

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

2021 NCB Rank	2020 NCB Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	NR	LindenGrove Communities	WI	511	0	258	253	4	4	0	0	0
102	98	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
103	99	United Methodist Communities	NJ	884	88	548	248	4	1	0	3	0
104	>200	Bethesda	MN	366	61	57	248	5	0	2	1	2
105	100	Ebenezer Society	MN	567	0	320	247	8	0	0	5	3
106	102	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
107	103	Friendship Senior Options	IL	1,115	689	184	242	2	2	0	0	0
108	114	Friendship Villages of St. Louis	MO	1,175	811	130	234	2	2	0	0	0
109	105	LifeSpire of Virginia	VA	1,268	756	285	227	4	4	0	0	0
110	106	National Church Residences	OH	1,768	1,022	521	225	12	3	4	5	0
111	107	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
112	108	Saint Mary's Home of Erie	PA	393	26	148	219	6	1	1	2	2
113	109	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
114	110	Liberty Lutheran Services	PA	978	443	318	217	5	4	0	1	0
115	112	LutherCare	PA	810	473	126	211	3	0	2	0	1
116	113	Morningside Ministries	TX	707	345	152	210	2	2	0	0	0
117	116	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
118	117	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
119	118	The United Methodist Retirement Homes, Inc.	NC	975	659	114	202	3	3	0	0	0
120	119	Immanuel	NE	1,240	646	393	201	17	7	1	7	2
121	120	Brazos Presbyterian Homes	TX	747	425	121	201	3	3	0	0	0
122	121	Baptist Retirement Homes of North Carolina, Inc.	NC	597	262	134	201	4	2	0	1	1
123	122	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
124	123	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
125	125	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

2021 NCB Rank	2020 NCB Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	124	Christian Living Communities	CO	930	427	311	192	6	3	0	3	0
127	111	Pinnacle Living	VA	1,127	544	393	190	5	5	0	0	0
128	127	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	3	3	0	0	0
129	128	Baptist Homes Society	PA	653	326	138	189	2	1	0	0	1
130	NR	The Lutheran Home and Harwood Place	WI	461	170	104	187	5	0	1	3	1
131	129	UMRC and Porter Hills	MI	1,199	678	335	186	6	3	2	1	0
132	130	St. John's United	MT	665	195	284	186	5	4	0	1	0
133	131	Wesley	WA	930	592	154	184	3	2	1	0	0
134	132	Messiah Lifeways	PA	808	441	183	184	2	1	1	0	0
135	133	Episcopal SeniorLife Communities	NY	716	334	200	182	7	1	3	3	0
136	135	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
137	136	SCBMA	SC	402	94	134	174	2	2	0	0	0
138	126	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
139	137	LifeStream Complete Senior Living, Inc.	AZ	694	369	158	167	4	1	2	1	0
140	182	Good Shepherd Communities, Inc.	NY	457	192	99	166	3	1	0	0	2
141	138	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
142	139	The Ohio Masonic Home	OH	732	302	266	164	3	2	1	0	0
143	101	Menno Haven, Inc.	PA	868	506	202	160	2	2	0	0	0
144	141	Holland Home	MI	1,198	751	288	159	6	2	0	2	2
145	115	Maple Knoll Communities, Inc.	OH	649	400	91	158	2	2	0	0	0
146	142	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
147	143	Allegheny Lutheran Social Ministries Inc.	PA	463	215	96	152	3	3	0	0	0
148	144	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
149	145	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
150	148	Living Branches	PA	839	459	237	143	3	2	0	1	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

2021 NCB Rank	2020 NCB Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	149	Sequoia Living	CA	946	702	103	141	3	3	0	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	154	Sunnyside Communities	VA	783	494	155	134	3	3	0	0	0
155	155	Givens Communities	NC	900	681	89	130	2	2	0	0	0
156	156	Community First Solutions	OH	409	180	101	128	3	2	0	0	1
157	146	Blue Skies of Texas	TX	984	728	129	127	2	2	0	0	0
158	150	Ingleside	MD	1,112	832	157	123	3	3	0	0	0
159	157	Bethany Lutheran Homes, Inc.	WI	726	282	321	123	10	2	1	6	1
160	158	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
161	159	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
162	160	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
163	161	Christian Care Centers, Inc.	TX	759	411	229	119	3	3	0	0	0
164	163	Sun Health Services	AZ	867	637	115	115	3	3	0	0	0
165	162	Lutheran Social Ministries of Maryland	MD	822	637	70	115	2	2	0	0	0
166	164	SantaFe Senior Living Inc.	FL	1,306	876	316	114	3	2	1	0	0
167	167	Sunset Senior Communities	MI	681	304	263	114	4	0	2	1	1
168	166	Benevolent Corporation Cedar Community	WI	747	412	225	110	8	0	3	4	1
169	168	CRISTA Senior Living	WA	624	374	141	109	2	2	0	0	0
170	169	Friends Homes, Inc.	NC	568	359	100	109	2	2	0	0	0
171	81	Lutheran Social Ministries of New Jersey, Inc.	NJ	493	270	114	109	2	1	0	0	1
172	175	Haverland Carter Lifestyle Group	NM	890	410	373	107	4	2	0	2	0
173	170	The Moorings, Incorporated	FL	777	557	114	106	3	1	2	0	0
174	171	The Wesley Communities	OH	678	338	234	106	3	1	2	0	0
175	172	Landis Communities	PA	808	545	160	103	3	1	1	1	0

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

2021 NCB Rank	2020 NCB Rank	System Name	State	Units (as of 12/31/20)				Communities (as of 12/31/20)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	174	Presbyterian Villages of Michigan	MI	1,270	904	264	102	10	1	7	2	0
177	165	Oakwood Lutheran Senior Ministries	WI	789	492	197	100	2	2	0	0	0
178	>200	ACC Senior Services	CA	371	146	126	99	4	0	1	2	1
179	177	Wesley Willows	IL	802	546	165	91	2	1	1	0	0
180	178	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
181	179	Skaalen Retirement Services	WI	419	229	99	91	8	0	4	3	1
182	180	The RiverWoods Group	NH	940	681	172	87	3	3	0	0	0
183	181	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
184	176	Knute Nelson	MN	474	211	180	83	6	0	2	3	1
185	195	Transforming Age	WA	2,427	1,677	672	78	18	3	10	5	0
186	184	Mather	IL	848	712	59	77	3	2	1	0	0
187	185	Redstone Presbyterian SeniorCare	PA	521	310	134	77	7	0	3	3	1
188	186	Christian Care Companies	AZ	2,168	1,687	413	68	6	0	5	0	1
189	187	Rockwood Retirement Communities	WA	505	346	94	65	2	2	0	0	0
190	189	St. Paul's Senior Services	CA	451	188	204	59	4	0	1	2	1
191	188	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
192	190	Episcopal Communities & Services	CA	566	436	82	48	3	3	0	0	0
193	191	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
194	183	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
195	192	Clark Retirement Community, Inc.	MI	400	195	166	39	2	2	0	0	0
196	193	Medford Leas	NJ	536	393	119	24	2	1	1	0	0
197	197	Jewish Senior Life of Metropolitan Detroit	MI	384	290	94	0	3	0	2	1	0
198	198	Bethesda Senior Living Communities	CO	1,738	111	1,627	0	18	0	2	16	0
199	199	Vista Prairie Communities	MN	783	100	683	0	9	0	0	9	0
200	200	Baruch Senior Ministries	MI	1,002	0	1,002	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 (352 to 137 Total Units)

Bethany Life (IA)

Crest View Senior Communities (MN)

Grace Lutheran Foundation, Inc. (WI)

Los Angeles Jewish Home (CA)

Masonic Homes of California (CA)

Miravida (WI)

MN Odd Fellows Home (MN)

Morningstar Senior Living, Inc. (PA)

Resthaven (MI)

Silverstone Living (NH)

Taylor Community (NH)

Three Pillars Senior Living Communities (WI)

Wesley Woods Senior Living (GA)

Woodhaven Retirement Community (MI)

WRC Senior Services (PA)

The Rankings: Change at a Glance

Greatest Changes in Units

Greatest Increase and Decrease	State	YE 2020 Units	YE 2019 Units	Change
Greatest Increase				
Presbyterian Homes and Services	MN	8,579	7,958	+621
Transforming Age	WA	2,427	1,848	+579
National Lutheran Communities and Services	MD	1,251	795	+456
National Senior Campuses	MA	21,313	20,917	+396
Presbyterian Homes of Georgia	GA	814	501	+313
Greatest Decrease				
Diakon Lutheran Social Ministries	PA	2,072	2,410	-338
Ohio Living	OH	2,952	3,286	-334
Lutheran Social Ministries of New Jersey	NJ	493	769	-276
Presbyterian Manors of Mid-America	KS	2,180	2,247	-67
Haverland Carter Lifestyle Group	NM	890	954	-64

The Rankings: Change at a Glance

Greatest Changes in Rank

Greatest Upward and Downward Change	State	2020 Rank	2019 Rank	Change
Greatest Upward Movement				
Presbyterian Homes of Georgia	GA	114	174	+60
National Lutheran Communities and Services	MD	65	118	+53
Bethany Lutheran Homes, Inc.	WI	133	164	+31
Life Enriching Communities	OH	83	112	+29
Lutheran Life Villages	IN	156	170	+14
Greatest Downward Movement				
Lutheran Social Ministries of New Jersey	NJ	177	122	-55
Oakwood Lutheran Senior Ministries	WI	121	91	-30
The Ohio Masonic Home	OH	132	118	-14
Saint Therese	MN	93	82	-11
Haverland Carter Lifestyle Group	NM	101	90	-11



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 two 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 2021 LZ 200 provides a side-by-side comparison of the unit mix for 2020 compared to 2019 for each of the organizations. The 2021 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 2021 LZ 200 reported more than 1,425 units in 2020 (Chart 4-1b). Slightly more than 40% of the 2021 LZ 200's total communities are Life Plan Communities, with the nearly 60% 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 12/31/20. The second set of columns show the unit mix as of 12/31/19.

Change in Total Units from 2019 to 2020. This column provides the change in the listed organization's TOTAL market-rate units (all levels of care) between year-end 2020 and year-end 2019.

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 2020 LZ 200, compared to the unit mix of the 2021 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, 2019, 2020 and 2021 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 2021 LZ 200 for 2020 compared to their portfolios at the end of 2019.

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 12/31/20. The second set of columns shows the communities owned, by type, as of 12/31/19.

Change in Total Communities from 2019 to 2020. This column provides the change in the listed organization's TOTAL communities (all types, excluding affordable housing) between year-end 2019 and year-end 2020. 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 2020 LZ 200, compared to the types of communities owned by the 2021 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 (2020 vs. 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2019 to 2020
				2020 Units				2019 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	1	National Senior Campuses, Inc.	MA	21,313	18,525	1,635	1,153	20,917	18,136	1,628	1,153	396
2	2	The Evangelical Lutheran Good Samaritan Society	SD	15,507	4,795	2,110	8,602	15,507	4,795	2,110	8,602	0
3	3	ACTS Retirement Services, Inc.	PA	9,563	6,728	1,133	1,702	9,592	6,737	1,118	1,737	-29
4	5	Presbyterian Homes and Services	MN	8,579	4,555	2,524	1,500	7,958	4,118	2,389	1,451	621
5	4	Ascension Living	MO	8,129	2,124	1,203	4,802	8,129	2,124	1,203	4,802	0
6	7	HumanGood	CA	5,503	3,371	1,095	1,037	5,474	3,351	1,093	1,030	29
7	6	Trinity Health Senior Communities	MI	5,496	1,839	1,199	2,458	5,595	1,839	1,199	2,557	-99
8	9	Lifespace Communities, Inc.	IA	5,234	3,652	599	983	5,179	3,663	535	981	55
9	8	Covenant Living Communities & Services	IL	5,203	3,357	870	976	5,228	3,363	884	981	-25
10	10	Benedictine	MN	4,616	879	1,577	2,160	4,394	726	1,496	2,172	222
11	11	Westminster Communities of Florida	FL	4,150	2,841	528	781	4,155	2,852	522	781	-5
12	12	Retirement Housing Foundation	CA	4,139	2,642	886	611	4,098	2,646	841	611	41
13	14	The Kendal Corporation	PA	3,693	2,450	736	507	3,629	2,512	609	508	64
14	17	Lutheran Senior Services	MO	3,691	1,826	763	1,102	3,541	1,678	744	1,119	150
15	13	Cassia	MN	3,670	522	1,512	1,636	3,920	522	1,512	1,886	-250
16	16	Asbury Communities, Inc.	MD	3,579	2,148	522	909	3,591	2,147	535	909	-12
17	15	Presbyterian Senior Living	PA	3,486	1,818	547	1,121	3,601	1,920	547	1,134	-115
18	20	Pacific Retirement Services	OR	3,364	2,561	398	405	3,073	2,310	378	385	291
19	18	Ohio Living	OH	2,952	1,632	453	867	3,286	1,732	567	987	-334
20	23	Otterbein SeniorLife	OH	2,921	1,215	635	1,071	2,630	1,123	496	1,011	291
21	19	The Carmelite System, Inc.	NY	2,898	51	498	2,349	3,157	144	421	2,592	-259
22	21	Front Porch Communities and Services	CA	2,860	2,159	183	518	2,860	2,159	183	518	0
23	22	Concordia Lutheran Ministries	PA	2,796	996	1,137	663	2,806	996	1,147	663	-10
24	24	Masonic Villages	PA	2,557	1,614	259	684	2,557	1,614	259	684	0
25	25	Springpoint Senior Living Inc.	NJ	2,534	1,735	308	491	2,548	1,740	317	491	-14

Organizational Characteristics: Units Rank Detailed by Units (2020 vs. 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2019 to 2020
				2020 Units				2019 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	26	Volunteers of America	VA	2,484	604	873	1,007	2,484	604	873	1,007	0
27	35	Transforming Age	WA	2,427	1,677	672	78	1,848	1,097	751	0	579
28	30	Shell Point Retirement Community	FL	2,245	1,447	449	349	2,204	1,406	449	349	41
29	31	Christian Horizons	MO	2,181	383	312	1,486	2,181	383	312	1,486	0
30	29	Presbyterian Manors of Mid-America, Inc.	KS	2,180	893	537	750	2,247	908	563	776	-67
31	28	Christian Care Companies	AZ	2,168	1,687	413	68	2,399	1,911	420	68	-231
32	32	Ecumen	MN	2,109	376	1,391	342	2,109	376	1,391	342	0
33	27	Diakon Lutheran Social Ministries	PA	2,072	763	414	895	2,410	918	531	961	-338
34	33	Willow Valley Communities	PA	2,068	1,570	198	300	2,044	1,547	214	283	24
35	34	Homewood Retirement Centers, Inc.	MD	1,888	1,149	288	451	1,873	1,134	288	451	15
36	37	Greencroft Communities	IN	1,864	654	586	624	1,842	646	586	610	22
37	36	WesleyLife	IA	1,788	764	366	658	1,843	808	375	660	-55
38	38	ArchCare	NY	1,782	0	59	1,723	1,782	0	59	1,723	0
39	44	National Church Residences	OH	1,768	1,022	521	225	1,607	861	521	225	161
40	39	Bethesda Senior Living Communities	CO	1,738	111	1,627	0	1,762	111	1,651	0	-24
41	51	United Church Homes, Inc.	OH	1,715	701	269	745	1,491	448	273	770	224
42	40	Franciscan Communities	IL	1,702	744	345	613	1,700	742	345	613	2
43	41	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	1,688	1,018	344	326	0
44	42	Loretto	NY	1,684	210	551	923	1,684	210	551	923	0
45	50	Eskaton	CA	1,659	393	780	486	1,507	393	688	426	152
46	43	Covenant Health	MA	1,636	0	364	1,272	1,636	0	364	1,272	0
47	49	BHI Senior Living, Inc.	IN	1,622	497	773	352	1,517	472	693	352	105
48	46	Presbyterian SeniorCare Network	PA	1,591	396	520	675	1,591	396	520	675	0
49	45	Hebrew SeniorLife	MA	1,584	655	115	814	1,592	659	119	814	-8
50	53	Bethesda Health Group, Inc.	MO	1,523	727	78	718	1,460	727	78	655	63

Organizational Characteristics: Units Rank Detailed by Units (2020 vs. 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2019 to 2020
				2020 Units				2019 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	48	Baptist Village Communities	OK	1,521	939	257	325	1,521	939	257	325	0
52	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	1,483	339	335	809	0
53	54	Mississippi Methodist Senior Services, Inc.	MS	1,423	753	350	320	1,446	788	338	320	-23
54	55	Providence Life Services	IL	1,421	767	372	282	1,421	767	372	282	0
55	56	Presbyterian Homes	IL	1,411	833	237	341	1,420	842	237	341	-9
56	47	Lutheran Life Communities	IL	1,402	408	310	684	1,551	408	360	783	-149
57	61	Lutheran Services Carolinas	NC	1,368	341	295	732	1,302	311	259	732	66
58	58	Masonicare	CT	1,326	651	309	366	1,326	651	309	366	0
59	59	Methodist Retirement Communities	TX	1,316	629	393	294	1,316	629	393	294	0
60	57	Covia Communities	CA	1,310	953	102	255	1,352	954	100	298	-42
61	60	SantaFe Senior Living Inc.	FL	1,306	876	316	114	1,306	876	316	114	0
62	62	Presbyterian Villages of Michigan	MI	1,270	904	264	102	1,270	904	264	102	0
63	63	LifeSpire of Virginia	VA	1,268	756	285	227	1,269	757	285	227	-1
64	64	Heritage Ministries	NY	1,268	363	221	684	1,268	363	221	684	0
65	117	National Lutheran Communities and Services	MD	1,251	697	245	309	795	435	180	180	456
66	66	Immanuel	NE	1,240	646	393	201	1,240	646	393	201	0
67	67	Wesley Enhanced Living	PA	1,235	646	229	360	1,235	629	246	360	0
68	65	American Baptist Homes of the Midwest	MN	1,220	359	272	589	1,245	384	253	608	-25
69	68	UMRC and Porter Hills	MI	1,199	678	335	186	1,199	678	335	186	0
70	69	Holland Home	MI	1,198	751	288	159	1,196	749	288	159	2
71	71	Western Home Services Inc.	IA	1,193	596	314	283	1,184	587	314	283	9
72	70	SpiriTrust Lutheran	PA	1,182	549	289	344	1,193	557	292	344	-11
73	86	Friendship Villages of St. Louis	MO	1,175	811	130	234	987	691	88	208	188
74	72	Phoebe Ministries	PA	1,163	370	259	534	1,163	370	259	534	0
75	73	Eventide	MN	1,156	71	533	552	1,142	71	469	602	14

Organizational Characteristics: Units Rank Detailed by Units (2020 vs. 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2019 to 2020
				2020 Units				2019 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	78	United Methodist Homes	NY	1,134	437	271	426	1,088	389	273	426	46
77	77	Pinnacle Living	VA	1,127	544	393	190	1,121	514	393	214	6
78	75	Friendship Senior Options	IL	1,115	689	184	242	1,127	701	184	242	-12
79	74	Ingleside	MD	1,112	832	157	123	1,128	832	157	139	-16
80	76	Lutheran SeniorLife	PA	1,083	492	192	399	1,123	489	192	442	-40
81	79	Walker Methodist	MN	1,075	0	748	327	1,075	0	748	327	0
82	111	Life Enriching Communities	OH	1,067	613	178	276	811	532	135	144	256
83	80	Lutheran Homes of South Carolina	SC	1,064	407	306	351	1,060	404	306	350	4
84	81	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	1,028	706	133	189	0
85	95	Christian Care Communities	KY	1,016	432	179	405	930	365	160	405	86
86	89	Baruch Senior Ministries	MI	1,002	0	1,002	0	957	2	955	0	45
87	85	Felician Services, Inc.	IL	990	177	268	545	990	177	268	545	0
88	83	Blue Skies of Texas	TX	984	728	129	127	1,001	728	129	144	-17
89	84	Presbyterian Communities of South Carolina	SC	983	411	298	274	1,001	411	316	274	-18
90	88	Liberty Lutheran Services	PA	978	443	318	217	972	437	318	217	6
91	87	The United Methodist Retirement Homes, Inc.	NC	975	659	114	202	984	674	108	202	-9
92	82	Saint Therese	MN	965	467	133	365	1,010	475	125	410	-45
93	92	United Church Homes and Services	NC	953	535	90	328	953	535	90	328	0
94	93	Sequoia Living	CA	946	702	103	141	946	702	103	141	0
95	108	The RiverWoods Group	NH	940	681	172	87	834	623	124	87	106
96	94	Wesley	WA	930	592	154	184	930	592	154	184	0
97	96	Christian Living Communities	CO	930	427	311	192	921	464	261	196	9
98	97	St. John's	NY	916	403	38	475	916	403	38	475	0
99	98	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	914	297	75	542	-1
100	99	Givens Communities	NC	900	681	89	130	895	674	91	130	5

Organizational Characteristics: Units Rank Detailed by Units (2020 vs. 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2019 to 2020
				2020 Units				2019 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
101	90	Haverland Carter Lifestyle Group	NM	890	410	373	107	954	414	442	98	-64
102	100	Masonic Homes Kentucky	KY	888	450	151	287	888	450	151	287	0
103	101	United Methodist Communities	NJ	884	88	548	248	878	88	542	248	6
104	102	St. Andrew's Resources for Seniors System	MO	877	379	208	290	877	379	208	290	0
105	104	Menno Haven, Inc.	PA	868	506	202	160	858	434	178	246	10
106	103	Sun Health Services	AZ	867	637	115	115	866	637	114	115	1
107	105	Goodwin House Incorporated	VA	850	580	121	149	850	580	121	149	0
108	115	Mather	IL	848	712	59	77	801	665	59	77	47
109	120	Garden Spot Communities	PA	845	621	105	119	774	569	86	119	71
110	106	Living Branches	PA	839	459	237	143	839	459	237	143	0
111	107	The New Jewish Home	NY	838	24	0	814	838	24	0	814	0
112	109	Lutheran Social Ministries of Maryland	MD	822	637	70	115	823	639	69	115	-1
113	173	Presbyterian Homes of Georgia	GA	814	330	149	335	501	117	89	295	313
114	112	LutherCare	PA	810	473	126	211	810	473	126	211	0
115	110	Landis Communities	PA	808	545	160	103	811	548	160	103	-3
116	113	Messiah Lifeways	PA	808	441	183	184	807	440	183	184	1
117	NR	Methodist Homes of Alabama & Northwest Florida	AL	803	39	339	425	803	39	339	425	0
118	116	Wesley Willows	IL	802	546	165	91	799	539	169	91	3
119	114	Simpson Senior Services	PA	802	454	170	178	802	454	170	178	0
120	91	Oakwood Lutheran Senior Ministries	WI	789	492	197	100	953	621	220	112	-164
121	119	Sunnyside Communities	VA	783	494	155	134	786	495	157	134	-3
122	129	Vista Prairie Communities	MN	783	100	683	0	736	100	636	0	47
123	130	The Moorings, Incorporated	FL	777	557	114	106	731	511	114	106	46
124	121	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	771	229	44	498	0
125	123	Grace Inspired Ministries	PA	767	451	151	165	767	451	151	165	0

Organizational Characteristics: Units Rank Detailed by Units (2020 vs. 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2019 to 2020
				2020 Units				2019 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
126	124	United Church of Christ Homes	PA	766	267	124	375	766	267	124	375	0
127	125	Samaritas	MI	761	293	120	348	762	294	120	348	-1
128	126	Christian Care Centers, Inc.	TX	759	411	229	119	757	409	229	119	2
129	127	Brazos Presbyterian Homes	TX	747	425	121	201	747	425	121	201	0
130	128	Benevolent Corporation Cedar Community	WI	747	412	225	110	746	409	227	110	1
131	118	The Ohio Masonic Home	OH	732	302	266	164	787	377	246	164	-55
132	163	Bethany Lutheran Homes, Inc.	WI	726	282	321	123	545	170	252	123	181
133	131	Emerald Communities	WA	725	527	107	91	725	527	107	91	0
134	143	Episcopal SeniorLife Communities	NY	716	334	200	182	647	334	131	182	69
135	132	Morningside Ministries	TX	707	345	152	210	707	343	154	210	0
136	133	Christian Health fka Christian Health Care Center	NJ	707	329	80	298	707	329	80	298	0
137	134	United Methodist Memorial Home	IN	699	188	255	256	699	188	255	256	0
138	139	LifeStream Complete Senior Living, Inc.	AZ	694	369	158	167	674	369	138	167	20
139	137	Sunset Senior Communities	MI	681	304	263	114	677	304	263	110	4
140	136	The Wesley Communities	OH	678	338	234	106	678	338	234	106	0
141	146	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	678	320	206	152	0
142	138	Vincentian Collaborative Services	PA	675	66	82	527	675	66	82	527	0
143	152	St. John's United	MT	665	195	284	186	588	145	257	186	77
144	141	Elder Care Alliance	CA	658	135	464	59	658	135	464	59	0
145	142	Baptist Homes Society	PA	653	326	138	189	653	326	138	189	0
146	135	Maple Knoll Communities, Inc.	OH	649	400	91	158	686	388	91	207	-37
147	144	Community Wellness Partners, Inc.	NY	640	124	0	516	640	124	0	516	0
148	140	Smith Senior Living	IL	636	322	144	170	658	322	144	192	-22
149	145	Wellspring Lutheran Services	MI	635	125	169	341	635	125	169	341	0
150	147	CRISTA Senior Living	WA	624	374	141	109	624	374	141	109	0

Organizational Characteristics: Units Rank Detailed by Units (2020 vs. 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2019 to 2020
				2020 Units				2019 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
151	148	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	623	3	256	364	0
152	149	Baptist Retirement Homes of North Carolina, Inc.	NC	597	262	134	201	601	262	138	201	-4
153	151	Genacross Lutheran Services	OH	597	137	175	285	598	138	175	285	-1
154	153	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	587	238	229	120	0
155	170	Lutheran Life Villages	IN	577	183	69	325	524	135	65	324	53
156	154	Episcopal Retirement Services	OH	576	267	115	194	576	267	115	194	0
157	155	Friends Homes, Inc.	NC	568	359	100	109	568	359	100	109	0
158	157	Havenwood Heritage Heights	NH	567	367	63	137	567	367	63	137	0
159	158	Ebenezer Society	MN	567	0	320	247	567	0	320	247	0
160	159	Episcopal Communities & Services	CA	566	436	82	48	566	436	82	48	0
161	160	Bethel	NY	563	170	130	263	563	170	130	263	0
162	161	Christian Village Communities	OH	559	221	190	148	559	221	190	148	0
163	162	Friendly Senior Living	NY	555	298	57	200	554	298	56	200	1
164	156	Sholom Community Alliance	MN	552	153	142	257	568	154	142	272	-16
165	164	Church Homes, Inc.	CT	542	319	24	199	542	319	24	199	0
166	165	Cardinal Ritter Senior Services	MO	541	205	90	246	541	205	90	246	0
167	166	Medford Leas	NJ	536	393	119	24	535	392	119	24	1
168	167	EHM Senior Solutions	MI	529	112	70	347	529	112	70	347	0
169	169	The Lutheran Home Association	WI	525	161	157	207	525	161	157	207	0
170	171	Redstone Presbyterian SeniorCare	PA	521	310	134	77	516	305	134	77	5
171	NR	LindenGrove Communities	WI	511	0	258	253	511	0	258	253	0
172	172	United Methodist Homes	CT	507	90	297	120	507	90	297	120	0
173	168	Rockwood Retirement Communities	WA	505	346	94	65	528	368	95	65	-23
174	174	Judson Services, Inc.	OH	500	227	135	138	500	227	135	138	0
175	175	Bethany St. Joseph Corporation	WI	497	135	158	204	497	135	158	204	0

Organizational Characteristics: Units Rank Detailed by Units (2020 vs. 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2019 to 2020
				2020 Units				2019 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
176	122	Lutheran Social Ministries of New Jersey, Inc.	NJ	493	270	114	109	769	277	182	310	-276
177	176	The Eliza Jennings Senior Care Network	OH	486	175	89	222	486	175	89	222	0
178	177	Knute Nelson	MN	474	211	180	83	484	211	180	93	-10
179	150	Deaconess Abundant Life Communities	MA	469	283	144	42	469	283	144	42	0
180	182	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	466	185	0	281	0
181	184	Allegheny Lutheran Social Ministries Inc.	PA	463	215	96	152	451	203	96	152	12
182	NR	The Lutheran Home and Harwood Place	WI	461	170	104	187	461	170	104	187	0
183	NR	Tabitha	NE	460	0	149	311	460	0	149	311	0
184	183	The Loomis Communities	MA	459	359	58	42	459	359	58	42	0
185	199	Good Shepherd Communities, Inc.	NY	457	192	99	166	383	194	105	84	74
186	178	St. Paul's Senior Services	CA	451	188	204	59	481	135	287	59	-30
187	186	Michigan Masonic Homes	MI	442	38	155	249	442	38	155	249	0
188	185	Beechwood Health Care Center, Inc.	NY	438	110	56	272	447	110	65	272	-9
189	188	Willow Brook Christian Communities	OH	437	230	123	84	437	230	123	84	0
190	189	Baptist Life Communities	KY	428	150	60	218	428	150	60	218	0
191	191	Skaalen Retirement Services	WI	419	229	99	91	421	229	101	91	-2
192	193	A.G.Rhodes	GA	418	0	0	418	418	0	0	418	0
193	194	Community First Solutions	OH	409	180	101	128	411	182	101	128	-2
194	195	SCBMA	SC	402	94	134	174	402	94	134	174	0
195	196	Clark Retirement Community, Inc.	MI	400	195	166	39	401	194	168	39	-1
196	197	Saint Mary's Home of Erie	PA	393	26	148	219	393	26	148	219	0
197	192	Jewish Senior Life of Metropolitan Detroit	MI	384	290	94	0	420	290	130	0	-36
198	190	Parker	NJ	372	0	60	312	427	0	80	347	-55
199	>200	ACC Senior Services	CA	371	146	126	99	371	146	126	99	0
200	>200	Bethesda	MN	366	61	57	248	366	61	57	248	0
		TOTAL UNITS		305,607	150,072	65,136	90,399	302,818	147,240	64,269	91,309	2,789

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	49,825	13,945	25,373	89,143	29%
25	76,035	23,310	39,088	138,433	45%
50	94,476	36,155	54,968	185,599	61%
100	122,516	49,523	70,991	243,030	80%
150	140,683	58,922	81,416	281,021	92%
200	150,072	65,136	90,399	305,607	100%

Analysis of Unit Mix for Each Year's Respective LZ 150 & LZ 200 Listing*

2016 LZ 150*				
2015 avg units/system	827.1	342.9	547.4	1,717.4
Percent of total	48.2%	20.0%	31.9%	100%
2017 LZ 150*				
2016 avg units/system	846.0	352.4	569.2	1,767.6
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	740.8	319.6	453.1	1513.5
Percent of total	48.9%	21.1%	29.9%	100%
2021 LZ 200**				
2020 avg units/system	750.4	325.7	452.0	1528.0
Percent of total	49.1%	21.3%	29.6%	100%

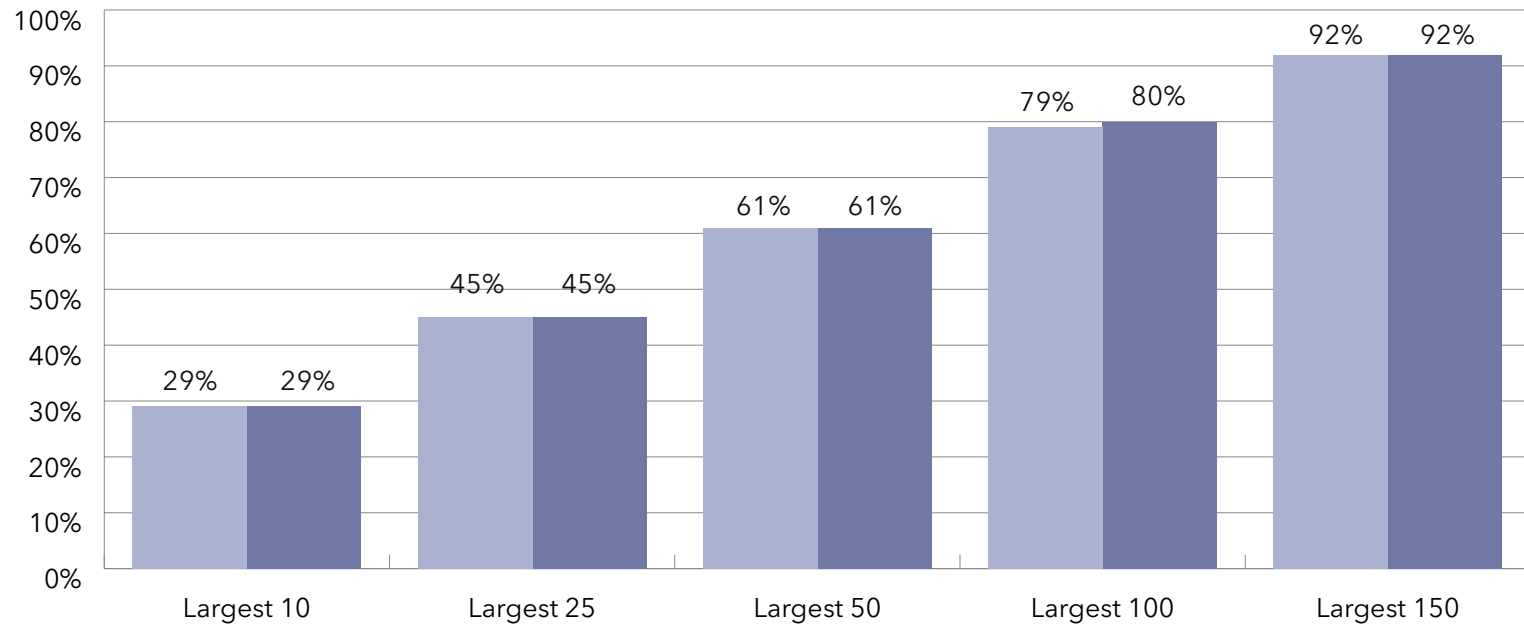
Largest	2020 Total Units	2019 Total Units	Change in total units	Percent change in total units
10	89,143	88,093	1,050	1.2%
25	138,433	137,545	888	0.6%
50	185,599	184,167	1,432	0.8%
100	243,030	240,946	2,084	0.9%
150	281,021	278,142	2,879	1.0%
200	305,607	302,693	2,914	1.0%

*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)

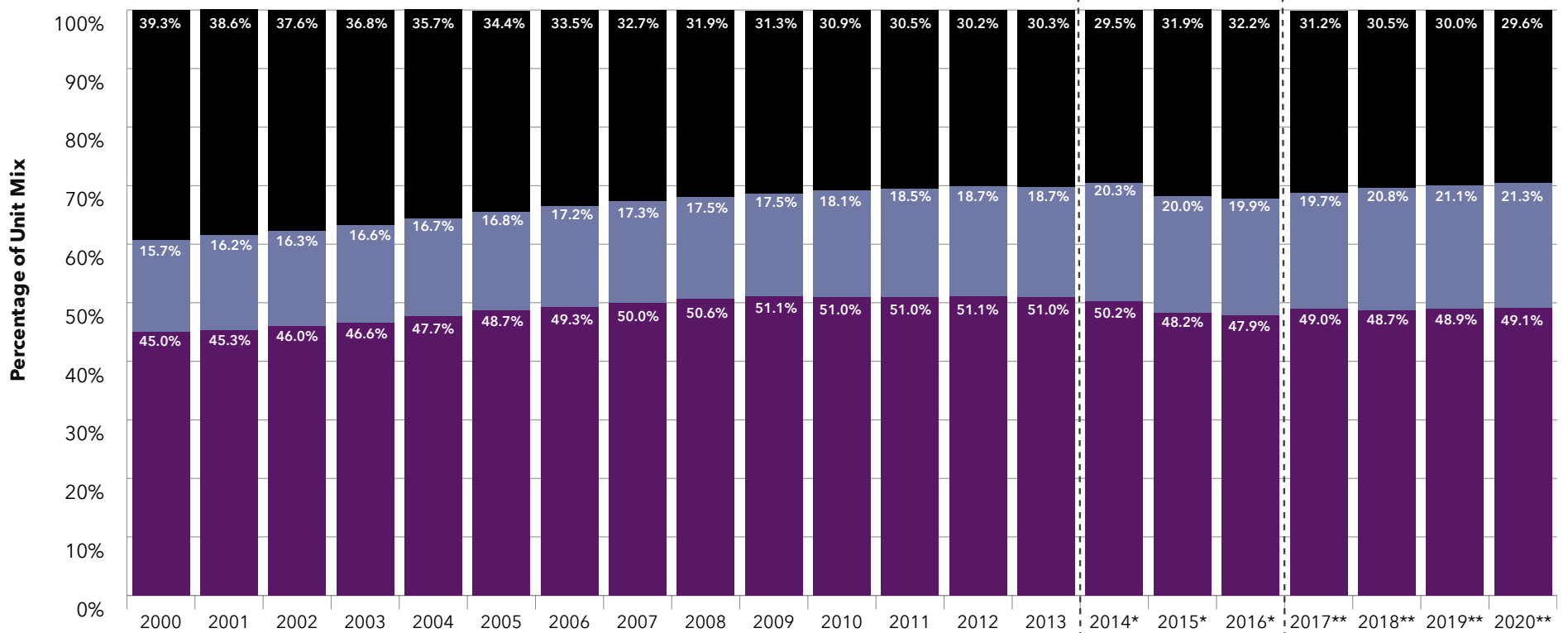


KEY:



Organizational Characteristics: Locations

Total Mix by Year, by Percent, 2000 Through 2020 for 2021 LZ 200



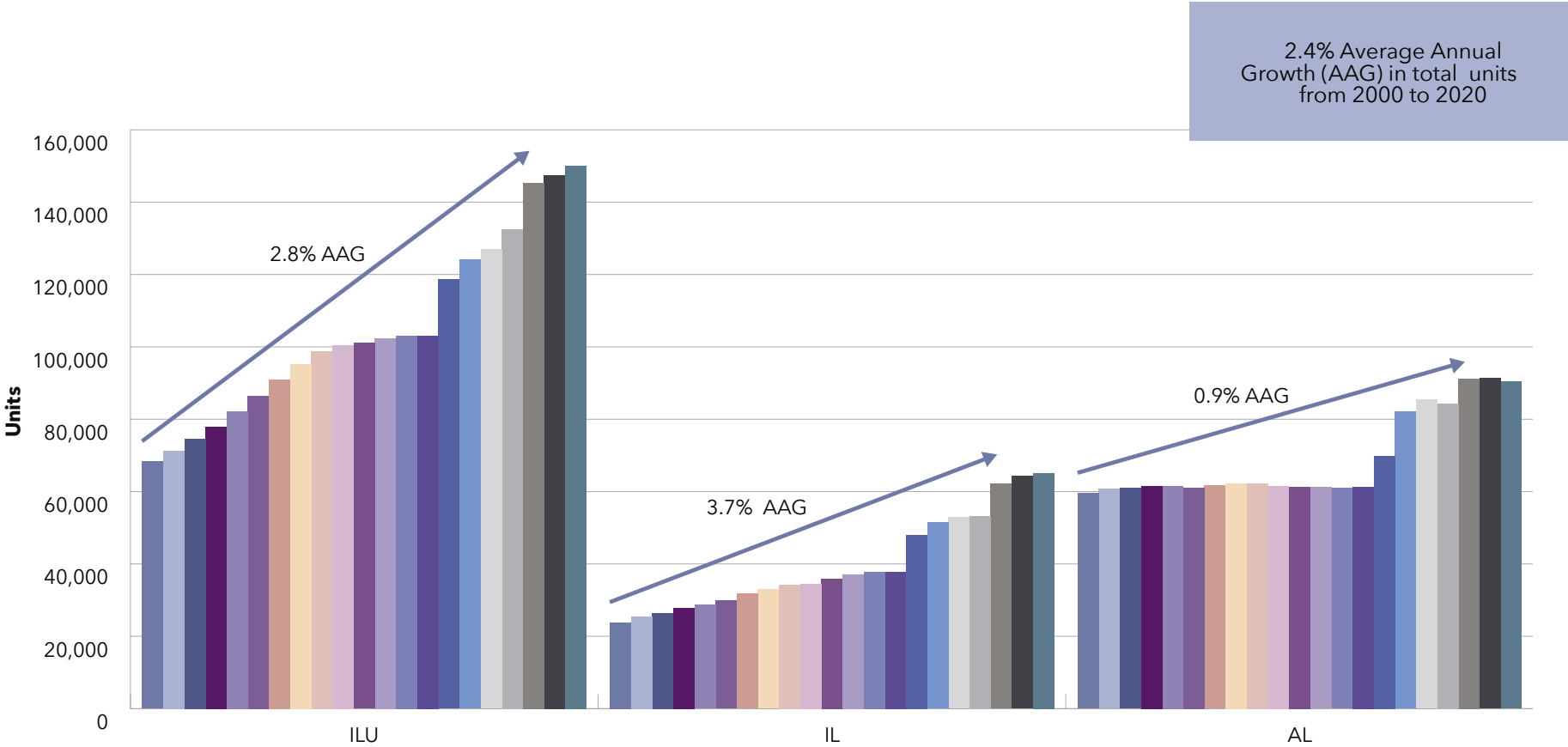
KEY: ■ ILU ■ ALU ■ NCB

*Note change from 100 to 150 with the 2014 publication

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

Organizational Characteristics: Locations

Unit Type Comparison, 2000 Through 2020 for 2021 LZ 200



KEY: 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010
 2011 2012 2013 2014* 2015* 2016* 2017** 2018** 2019** 2020**

*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 (2020 vs 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2019 to 2020
				2020 Communities					2019 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
1	1	The Evangelical Lutheran Good Samaritan Society	SD	142	53	8	9	72	142	53	8	9	72	0
2	2	Trinity Health Senior Communities	MI	53	6	13	14	20	54	6	13	14	21	-1
3	5	Presbyterian Homes and Services	MN	52	16	33	0	3	46	15	28	0	3	6
4	3	Cassia	MN	50	0	5	28	17	51	0	5	28	18	-1
5	4	Ascension Living	MO	48	2	5	3	38	48	2	5	3	38	0
6	6	Benedictine	MN	34	10	4	3	17	33	25	1	4	3	1
7	7	Ecumen	MN	30	0	5	20	5	30	0	5	20	5	0
8	8	ACTS Retirement Services, Inc.	PA	26	26	0	0	0	26	26	0	0	0	0
9	9	Baruch Senior Ministries	MI	24	0	0	24	0	24	0	0	24	0	0
10	10	Volunteers of America	VA	23	4	2	9	8	23	4	2	9	8	0
11	11	HumanGood	CA	21	20	1	0	0	21	20	1	0	0	0
12	13	Covenant Living Communities & Services	IL	18	13	3	1	1	18	13	2	2	1	0
13	12	Presbyterian Senior Living	PA	18	11	5	2	0	20	12	6	2	0	-2
14	14	Retirement Housing Foundation	CA	18	9	8	1	0	18	9	8	1	0	0
15	24	Transforming Age	WA	18	3	10	5	0	14	3	7	4	0	4
16	15	Bethesda Senior Living Communities	CO	18	0	2	16	0	18	0	2	16	0	0
17	22	Otterbein SeniorLife	OH	17	8	0	0	9	15	6	0	0	9	2
18	16	Immanuel	NE	17	7	1	7	2	17	7	1	7	2	0
19	17	National Senior Campuses, Inc.	MA	16	16	0	0	0	16	16	0	0	0	0
20	20	Lifespace Communities, Inc.	IA	15	15	0	0	0	15	15	0	0	0	0
21	19	Presbyterian Manors of Mid-America, Inc.	KS	15	14		1	0	16	15	0	1	0	-1
22	18	The Carmelite System, Inc.	NY	15	1	0	3	11	16	1	1	2	12	-1
23	23	Concordia Lutheran Ministries	PA	14	6	0	6	2	14	6	0	6	2	0
24	21	The Kendal Corporation	PA	13	11	1	0	1	13	11	1	0	1	0
25	27	Christian Horizons	MO	13	11	0	1	1	13	11	0	1	1	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2020 vs 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2019 to 2020
				2020 Communities					2019 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
26	25	Westminster Communities of Florida	FL	13	10	3	0	0	13	10	3	0	0	0
27	35	United Church Homes, Inc.	OH	13	5	4	0	4	11	5	2	0	4	2
28	30	Eskaton	CA	13	1	1	8	3	12	1	1	7	3	1
29	28	Covenant Health	MA	13	0	0	4	9	12	0	0	3	9	1
30	26	Ohio Living	OH	12	9	1	0	2	13	13	0	0	0	-1
31	46	National Church Residences	OH	12	3	4	5	0	9	3	3	3	0	3
32	29	Baptist Village Communities	OK	12	3	8	1	0	12	3	8	1	0	0
33	32	Mississippi Methodist Senior Services, Inc.	MS	12	2	8	0	2	12	2	8	0	2	0
34	31	Bethesda Health Group, Inc.	MO	12	0	6	2	4	12	0	6	2	4	0
35	33	Bethany St. Joseph Corporation	WI	12	0	5	5	2	12	0	5	5	2	0
36	34	Lutheran Senior Services	MO	11	9	0	1	1	11	8	0	1	2	0
37	41	Pacific Retirement Services	OR	10	10	0	0	0	9	9	0	0	0	1
38	37	WesleyLife	IA	10	8	0	0	2	10	8	0	0	2	0
39	36	Front Porch Communities and Services	CA	10	5	5	0	0	10	5	5	0	0	0
40	39	Bethany Lutheran Homes, Inc.	WI	10	2	1	6	1	10	2	1	6	1	0
41	38	Presbyterian Villages of Michigan	MI	10	1	7	2	0	10	1	7	2	0	0
42	42	Springpoint Senior Living Inc.	NJ	9	8	0	0	1	9	8	0	0	1	0
43	44	Greencroft Communities	IN	9	7	0	2	0	9	7	0	2	0	0
44	45	Loretto	NY	9	1	2	4	2	9	1	2	4	2	0
45	47	Lutheran Services Carolinas	NC	9	1	1	1	6	9	1	1	1	6	0
46	50	Wellspring Lutheran Services	MI	9	1	2	2	4	9	1	2	2	4	0
47	48	Walker Methodist	MN	9	0	0	8	1	9	0	0	8	1	0
48	56	Vista Prairie Communities	MN	9	0	0	9	0	8	0	0	8	0	1
49	51	Asbury Communities, Inc.	MD	8	8	0	0	0	8	8	0	0	0	0
50	43	Diakon Lutheran Social Ministries	PA	8	8	0	0	0	9	9	0	0	0	-1

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2020 vs 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2019 to 2020
				2020 Communities					2019 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
51	76	Eventide	MN	8	5	0	2	1	6	5	0	1	0	2
52	53	Heritage Ministries	NY	8	4	2	1	1	8	4	2	1	1	0
53	66	Christian Care Communities	KY	8	3	3	1	1	7	5	1	1	0	1
54	52	Magnolia Manor, Inc.	GA	8	2	4	1	1	8	2	4	1	1	0
55	54	Felician Services, Inc.	IL	8	2	2	1	3	8	2	2	1	3	0
56	58	EHM Senior Solutions	MI	8	1	3	2	2	8	1	3	2	2	0
57	55	Benevolent Corporation Cedar Community	WI	8	0	3	4	1	8	0	3	4	1	0
58	57	Ebenezer Society	MN	8	0	0	5	3	8	0	0	5	3	0
59	59	Skaalen Retirement Services	WI	8	0	4	3	1	8	0	4	3	1	0
60	62	Presbyterian SeniorCare Network	PA	7	7	0	0	0	7	7	0	0	0	0
61	64	Methodist Retirement Communities	TX	7	5	1	1	0	7	5	1	1	0	0
62	65	American Baptist Homes of the Midwest	MN	7	5	0	0	2	7	5	0	0	2	0
63	61	Franciscan Communities	IL	7	4	1	0	2	7	4	1	2	0	0
64	63	Providence Life Services	IL	7	1	4	1	1	7	1	4	1	1	0
65	49	Episcopal SeniorLife Communities	NY	7	1	3	3	0	7	1	3	3	0	0
66	67	Redstone Presbyterian SeniorCare	PA	7	0	3	3	1	7	0	3	3	1	0
67	69	Buckner Retirement Services, Inc.	TX	6	6	0	0	0	6	6	0	0	0	0
68	77	Presbyterian Communities of South Carolina	SC	6	6	0	0	0	6	6	0	0	0	0
69	72	Wesley Enhanced Living	PA	6	5	0	1	0	6	5	0	1	0	0
70	75	SpiriTrust Lutheran	PA	6	5	1	0	0	6	6	0	0	0	0
71	79	United Church of Christ Homes	PA	6	4	2	0	0	6	0	2	0	4	0
72	73	UMRC and Porter Hills	MI	6	3	2	1	0	6	3	2	1	0	0
73	96	Christian Living Communities	CO	6	3	0	3	0	5	3	0	2	0	1
74	71	Masonicare	CT	6	2	2	1	1	6	2	2	1	1	0
75	74	Holland Home	MI	6	2	0	2	2	6	2	0	2	2	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2020 vs 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2019 to 2020
				2020 Communities					2019 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
76	81	The Lutheran Home Association	WI	6	2	1	2	1	6	2	1	2	1	0
77	84	Baptist Life Communities	KY	6	1	2	1	2	6	1	2	1	2	0
78	85	Saint Mary's Home of Erie	PA	6	1	1	2	2	6	1	1	2	2	0
79	60	Christian Care Companies	AZ	6	0	5	0	1	7	0	6	0	1	-1
80	68	ArchCare	NY	6	0	0	1	5	6	0	0	1	5	0
81	78	St. Andrew's Resources for Seniors System	MO	6	0	3	1	2	6	1	2	1	2	0
82	80	Chelsea Jewish Lifecare, Inc.	MA	6	0	1	2	3	6	0	1	2	3	0
83	82	Knute Nelson	MN	6	0	2	3	1	6	0	2	3	1	0
84	88	BHI Senior Living, Inc.	IN	5	5	0	0	0	5	5	0	0	0	0
85	89	Covia Communities	CA	5	5	0	0	0	5	5	0	0	0	0
86	92	Pinnacle Living	VA	5	5	0	0	0	5	5	0	0	0	0
87	93	Lutheran Homes of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
88	87	Homewood Retirement Centers, Inc.	MD	5	4	1	0	0	5	5	0	0	0	0
89	70	Lutheran Life Communities	IL	5	4	0	0	1	6	4	0	0	2	-1
90	95	Liberty Lutheran Services	PA	5	4	0	1	0	5	4	0	1	0	0
91	101	St. John's United	MT	5	4	0	1	0	5	4	0	1	0	0
92	86	Masonic Villages	PA	5	3	1	0	1	5	3	1	0	1	0
93	94	Saint Therese	MN	5	3	0	1	1	5	3	1	0	1	0
94	90	Western Home Services Inc.	IA	5	2	2	0	1	5	2	2	0	1	0
95	91	Lutheran SeniorLife	PA	5	2	3	0	0	5	2	3	0	0	0
96	NR	Methodist Homes of Alabama & Northwest Florida	AL	5	1	0	3	1	5	1	0	3	1	0
97	97	Samaritas	MI	5	1	2	0	2	5	1	2	0	2	0
98	99	Elder Care Alliance	CA	5	1	1	3	0	5	1	1	3	0	0
99	103	Bethel	NY	5	1	1	1	2	5	1	1	1	2	0
100	98	Christian Health fka Christian Health Care Center	NJ	5	0	3	1	1	5	0	3	1	1	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2020 vs 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2019 to 2020
				2020 Communities					2019 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
101	185	United Lutheran Program for the Aging, Inc.	WI	5	0	1	3	1	5	0	1	3	1	0
102	102	Sholom Community Alliance	MN	5	0	1	2	2	5	0	1	2	2	0
103	NR	The Lutheran Home and Harwood Place	WI	5	0	1	3	1	5	0	1	3	1	0
104	105	Parker	NJ	5	0	0	1	4	5	0	0	1	4	0
105		Bethesda	MN	5	0	2	1	2	5	0	2	1	2	0
106	108	LifeSpire of Virginia	VA	4	4	0	0	0	4	4	0	0	0	0
107	109	Phoebe Ministries	PA	4	4	0	0	0	4	4	0	0	0	0
108	NR	LindenGrove Communities	WI	4	4	0	0	0	4	4	0	0	0	0
109	107	Presbyterian Homes	IL	4	3	1	0	0	4	3	1	0	0	0
110	110	United Methodist Homes	NY	4	3	0	1	0	4	3	1	0	0	0
111	144	National Lutheran Communities and Services	MD	4	2	1	1	0	3	0	2	1	0	1
112	106	Hebrew SeniorLife	MA	4	2	1	0	1	4	2	1	0	1	0
113	111	Haverland Carter Lifestyle Group	NM	4	2	0	2	0	4	2	0	2	0	0
114	115	Vincentian Collaborative Services	PA	4	2	0	0	2	4	2	0	0	2	0
115	118	Baptist Retirement Homes of North Carolina, Inc.	NC	4	2	0	1	1	4	2	0	1	1	0
116	120	Shepherd of the Valley Lutheran Retirement Services	OH	4	2	1	0	1	4	2	1	0	1	0
117	113	United Methodist Communities	NJ	4	1	0	3	0	4	1	0	3	0	0
118	116	LifeStream Complete Senior Living, Inc.	AZ	4	1	2	1	0	4	1	2	0	1	0
119	122	Cardinal Ritter Senior Services	MO	4	1	1	1	1	4	1	1	1	1	0
120	112	St. John's	NY	4	0	1	1	2	4	0	1	1	2	0
121	114	Sunset Senior Communities	MI	4	0	2	1	1	4	2	0	1	1	0
122	117	Community Wellness Partners, Inc.	NY	4	0	1	1	2	4	0	1	1	2	0
123	121	Friendly Senior Living	NY	4	0	2	1	1	4	0	2	1	1	0
124	124	Presbyterian Homes and Services of Kentucky	KY	4	0	0	2	2	4	0	0	2	2	0
125	123	St. Paul's Senior Services	CA	4	0	1	2	1	4	0	1	2	1	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2020 vs 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2019 to 2020
				2020 Communities					2019 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
126	>200	ACC Senior Services	CA	4	0	1	2	1	4	0	1	2	1	0
127	126	Willow Valley Communities	PA	3	3	0	0	0	3	3	0	0	0	0
128	128	Ingleside	MD	3	3	0	0	0	3	3	0	0	0	0
129	173	Life Enriching Communities	OH	3	3	0	0	0	2	2	0	0	0	1
130	129	The Presbyterian Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
131	130	The United Methodist Retirement Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
132	131	United Church Homes and Services	NC	3	3	0	0	0	3	3	0	0	0	0
133	132	Sequoia Living	CA	3	3	0	0	0	3	3	0	0	0	0
134	139	The RiverWoods Group	NH	3	3	0	0	0	3	3	0	0	0	0
135	136	Sun Health Services	AZ	3	3	0	0	0	3	3	0	0	0	0
136	104	Presbyterian Homes of Georgia	GA	3	3	0	0	0	2	2	0	0	0	1
137	142	Simpson Senior Services	PA	3	3	0	0	0	3	3	0	0	0	0
138	146	Sunnyside Communities	VA	3	3	0	0	0	3	3	0	0	0	0
139	148	Christian Care Centers, Inc.	TX	3	3	0	0	0	3	3	0	0	0	0
140	149	Brazos Presbyterian Homes	TX	3	3	0	0	0	3	3	0	0	0	0
141	150	United Methodist Memorial Home	IN	3	3	0	0	0	3	3	0	0	0	0
142	152	Episcopal Retirement Services	OH	3	3	0	0	0	3	3	0	0	0	0
143	153	Episcopal Communities & Services	CA	3	3	0	0	0	3	3	0	0	0	0
144	158	Allegheny Lutheran Social Ministries Inc.	PA	3	3	0	0	0	3	3	0	0	0	0
145	157	The Loomis Communities	MA	3	3	0	0	0	3	3	0	0	0	0
146	127	SantaFe Senior Living Inc.	FL	3	2	1	0	0	3	2	1	0	0	0
147	133	Wesley	WA	3	2	1	0	0	3	2	1	0	0	0
148	134	St. Ann's of Greater Rochester, Inc.	NY	3	2	1	0	0	3	2	1	0	0	0
149	135	Masonic Homes Kentucky	KY	3	2	1	0	0	3	1	1	0	1	0
150	143	Mather	IL	3	2	1	0	0	3	2	1	0	0	0

NR: Not Ranked in that year

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2020 vs 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2019 to 2020
				2020 Communities					2019 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
151	137	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
152	145	The Ohio Masonic Home	OH	3	2	1	0	0	3	2	0	1	0	0
153	119	Genacross Lutheran Services	OH	3	2	1	0	0	4	2	1	0	1	-1
154	161	Willow Brook Christian Communities	OH	3	2	0	1	0	3	2	0	1	0	0
155	163	Community First Solutions	OH	3	2	0	0	1	3	3	0	0	0	0
156	140	Landis Communities	PA	3	1	1	1	0	3	1	1	1	0	0
157	179	The Moorings, Incorporated	FL	3	1	2	0	0	2	2	0	0	0	1
158	151	The Wesley Communities	OH	3	1	2	0	0	3	1	2	0	0	0
159	154	Lutheran Life Villages	IN	3	1	0	0	2	3	1	0	0	2	0
160	155	United Methodist Homes	CT	3	1	0	2	0	3	1	0	2	0	0
161	156	The Eliza Jennings Senior Care Network	OH	3	1	0	1	1	3	1	0	1	1	0
162	100	Deaconess Abundant Life Communities	MA	3	1	1	1	0	3	1	1	1	0	0
163	199	Good Shepherd Communities, Inc.	NY	3	1	0	0	2	2	2	0	0	0	1
164	138	The New Jewish Home	NY	3	0	1	0	2	3	0	1	0	2	0
165	141	LutherCare	PA	3	0	2	0	1	3	2	0	0	1	0
166	NR	Tabitha	NE	3	0	0	1	2	3	0	0	1	2	0
167	159	Beechwood Health Care Center, Inc.	NY	3	0	1	1	1	3	0	1	1	1	0
168	162	A.G.Rhodes	GA	3	0	0	0	3	3	0	0	0	3	0
169	125	Jewish Senior Life of Metropolitan Detroit	MI	3	0	2	1	0	4	0	2	2	0	-1
170	164	Shell Point Retirement Community	FL	2	2	0	0	0	2	2	0	0	0	0
171	167	Friendship Villages of St. Louis	MO	2	2	0	0	0	2	2	0	0	0	0
172	165	Friendship Senior Options	IL	2	2	0	0	0	2	2	0	0	0	0
173	166	Blue Skies of Texas	TX	2	2	0	0	0	2	2	0	0	0	0
174	169	Givens Communities	NC	2	2	0	0	0	2	2	0	0	0	0
175	170	Menno Haven, Inc.	PA	2	2	0	0	0	2	2	0	0	0	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2020 vs 2019)

2021 Rank	2020 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2019 to 2020
				2020 Communities					2019 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
176	171	Goodwin House Incorporated	VA	2	2	0	0	0	2	2	0	0	0	0
177	172	Lutheran Social Ministries of Maryland	MD	2	2	0	0	0	2	2	0	0	0	0
178	168	Oakwood Lutheran Senior Ministries	WI	2	2	0	0	0	2	2	0	0	0	0
179	178	Grace Inspired Ministries	PA	2	2	0	0	0	2	2	0	0	0	0
180	180	Emerald Communities	WA	2	2	0	0	0	2	2	0	0	0	0
181	181	Morningside Ministries	TX	2	2	0	0	0	2	2	0	0	0	0
182	182	Maple Knoll Communities, Inc.	OH	2	2	0	0	0	2	2	0	0	0	0
183	183	Smith Senior Living	IL	2	2	0	0	0	2	2	0	0	0	0
184	186	CRISTA Senior Living	WA	2	2	0	0	0	2	2	0	0	0	0
185	187	Friends Homes, Inc.	NC	2	2	0	0	0	2	2	0	0	0	0
186	188	Havenwood Heritage Heights	NH	2	2	0	0	0	2	2	0	0	0	0
187	189	Christian Village Communities	OH	2	2	0	0	0	2	2	0	0	0	0
188	190	Church Homes, Inc.	CT	2	2	0	0	0	2	2	0	0	0	0
189	192	Rockwood Retirement Communities	WA	2	2	0	0	0	2	2	0	0	0	0
190	196	SCBMA	SC	2	2	0	0	0	2	2	0	0	0	0
191	197	Clark Retirement Community, Inc.	MI	2	2	0	0	0	2	2	0	0	0	0
192	176	Garden Spot Communities	PA	2	1	0	0	1	2	1	0	0	1	0
193	174	Messiah Lifeways	PA	2	1	1	0	0	2	1	1	0	0	0
194	175	Wesley Willows	IL	2	1	1	0	0	2	1	1	0	0	0
195	177	Amsterdam Continuing Care Health System, Inc.	NY	2	1	0	0	1	2	1	0	0	1	0
196	184	Baptist Homes Society	PA	2	1	0	0	1	2	1	0	0	1	0
197	191	Medford Leas	NJ	2	1	1	0	0	2	1	1	0	0	0
198	193	Judson Services, Inc.	OH	2	1	1	0	0	2	1	1	0	0	0
199	147	Lutheran Social Ministries of New Jersey, Inc.	NJ	2	1	0	0	1	3	1	0	0	2	-1
200	195	Michigan Masonic Homes	MI	2	1	0	0	1	2	1	0	0	1	0
		TOTAL UNITS		1,600	665	276	312	347	1,582	685	254	306	337	18

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	117	75	110	180	482	30%
25	262	106	153	207	728	46%
50	364	164	213	251	992	62%
100	494	233	272	301	1,300	81%
150	594	258	302	327	1,481	93%
200	665	276	312	347	1,600	100%

Analysis of Community Mix for Each Year's Respective LZ 200 Listing*					
	LPC	IL	AL	NH	ALL
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 150*					
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%
2021 LZ 200**					
2020 avg communities/system	3.3	1.4	1.6	1.7	8.0
Percent of total	41.6%	17.3%	19.5%	21.7%	100.0%

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

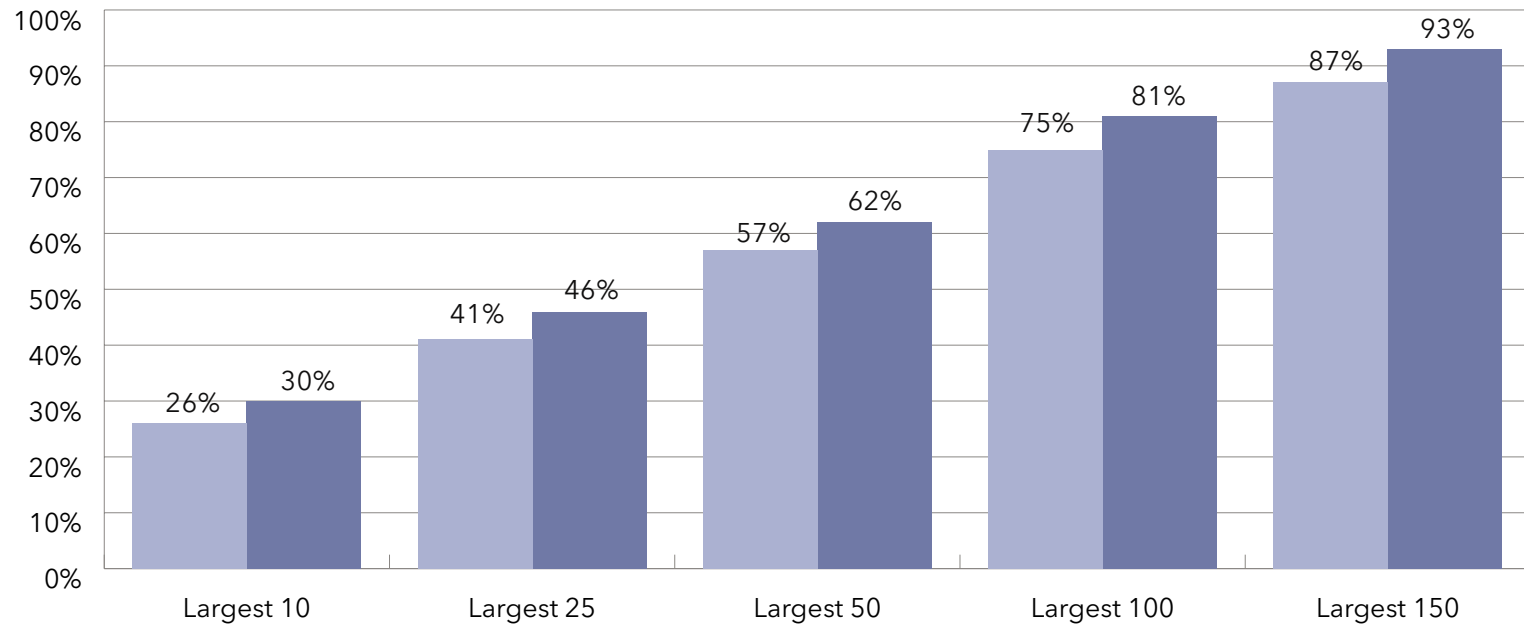
**Note change from 150 to 200 in the 2018 publication

Largest	2020 Total Communities	2019 Total Communities	Change in total communities	Percent change in total communities
10	482	419	63	13.1%
25	728	646	82	11.3%
50	992	900	92	9.3%
100	1,300	1,198	102	7.8%
150	1,481	1,374	107	7.2%
200	1,600	1,587	13	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)

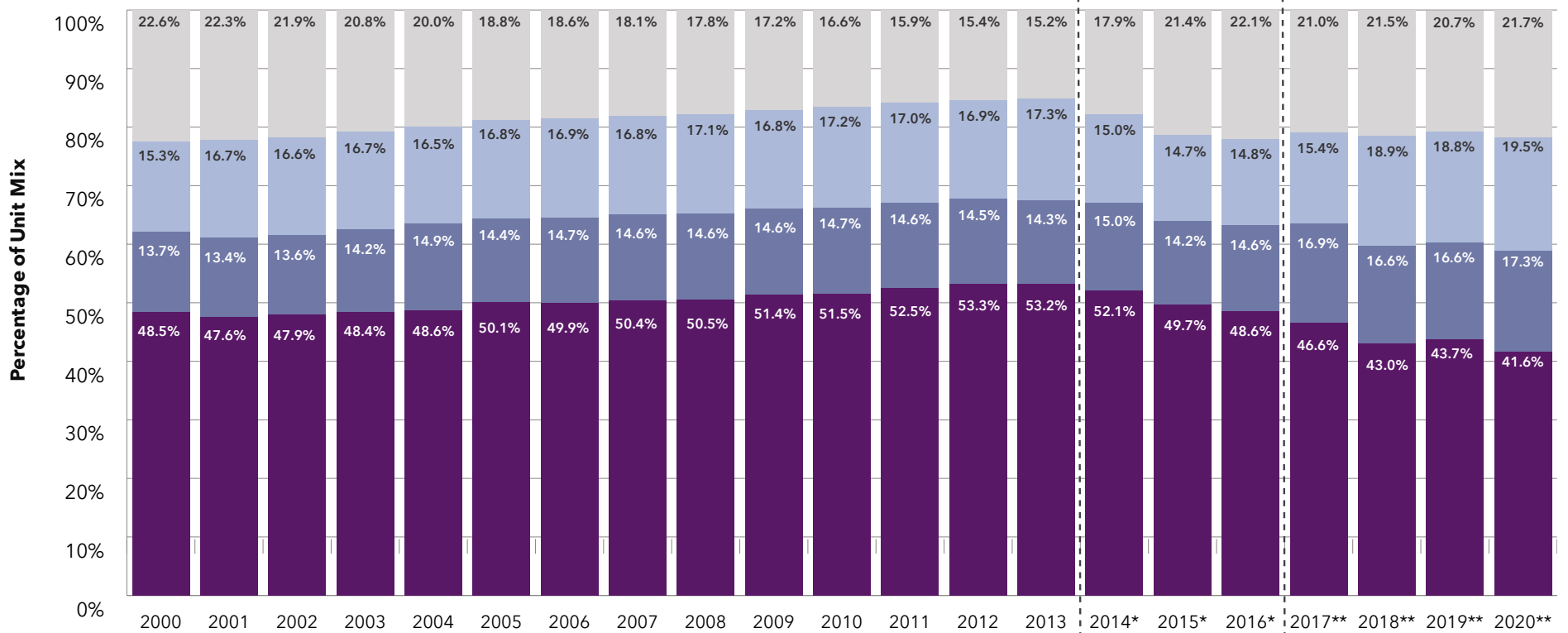


KEY:



Organizational Characteristics: Communities

Total Mix by Year, by Percent, 2000 Through 2020 for 2021 LZ 200



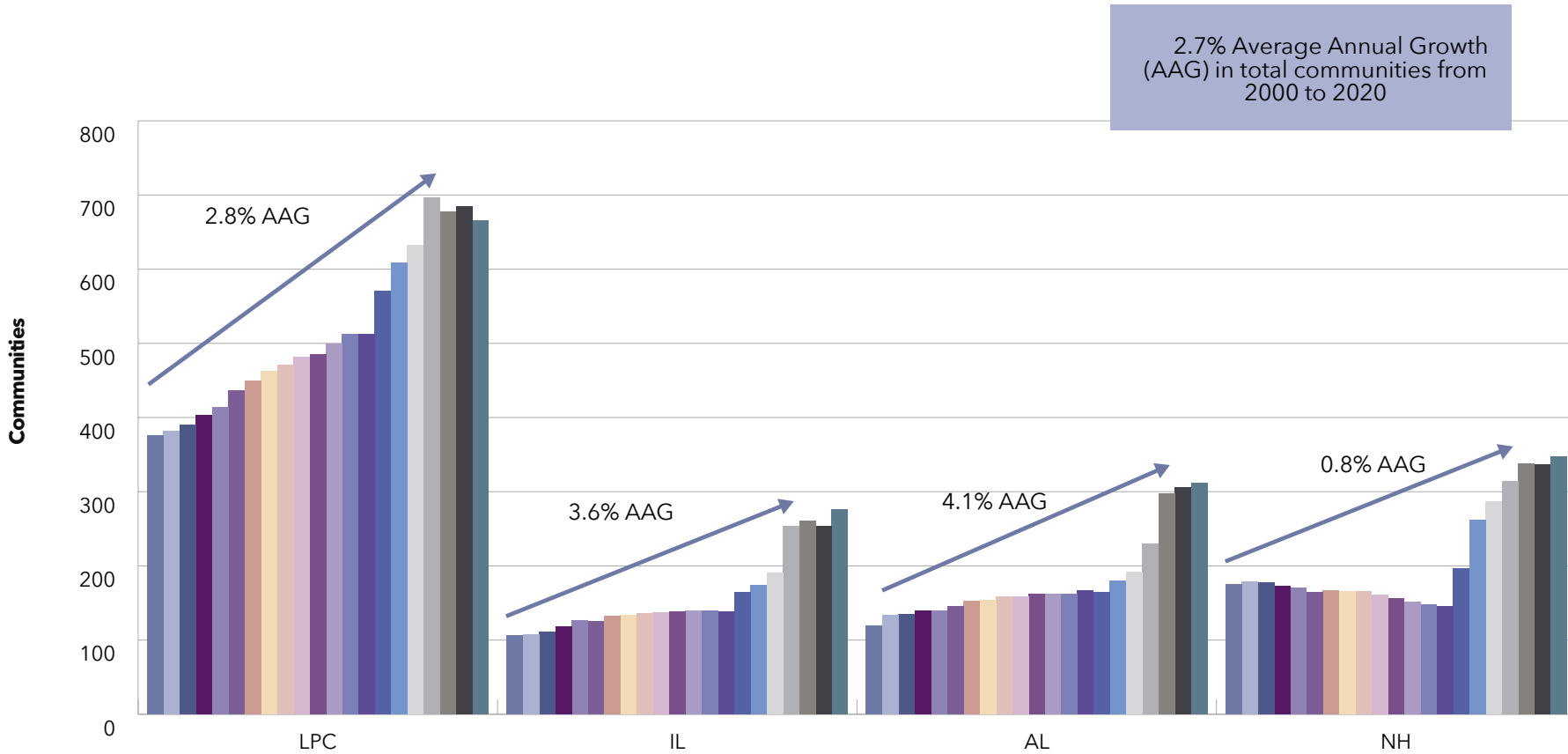
KEY: ■ LPC ■ IL ■ AL ■ NH

*Note change from 100 to 150 with the 2014 publication

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

Organizational Characteristics: Communities

Community Type Comparison, by Community, 2000 Through 2020 for 2021 LZ 200



KEY:

- 2000
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012
- 2013
- 2014*
- 2015*
- 2016*
- 2017**
- 2018**
- 2019**
- 2020**

*Reflects change from 100 to 150 with the 2014 publication

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

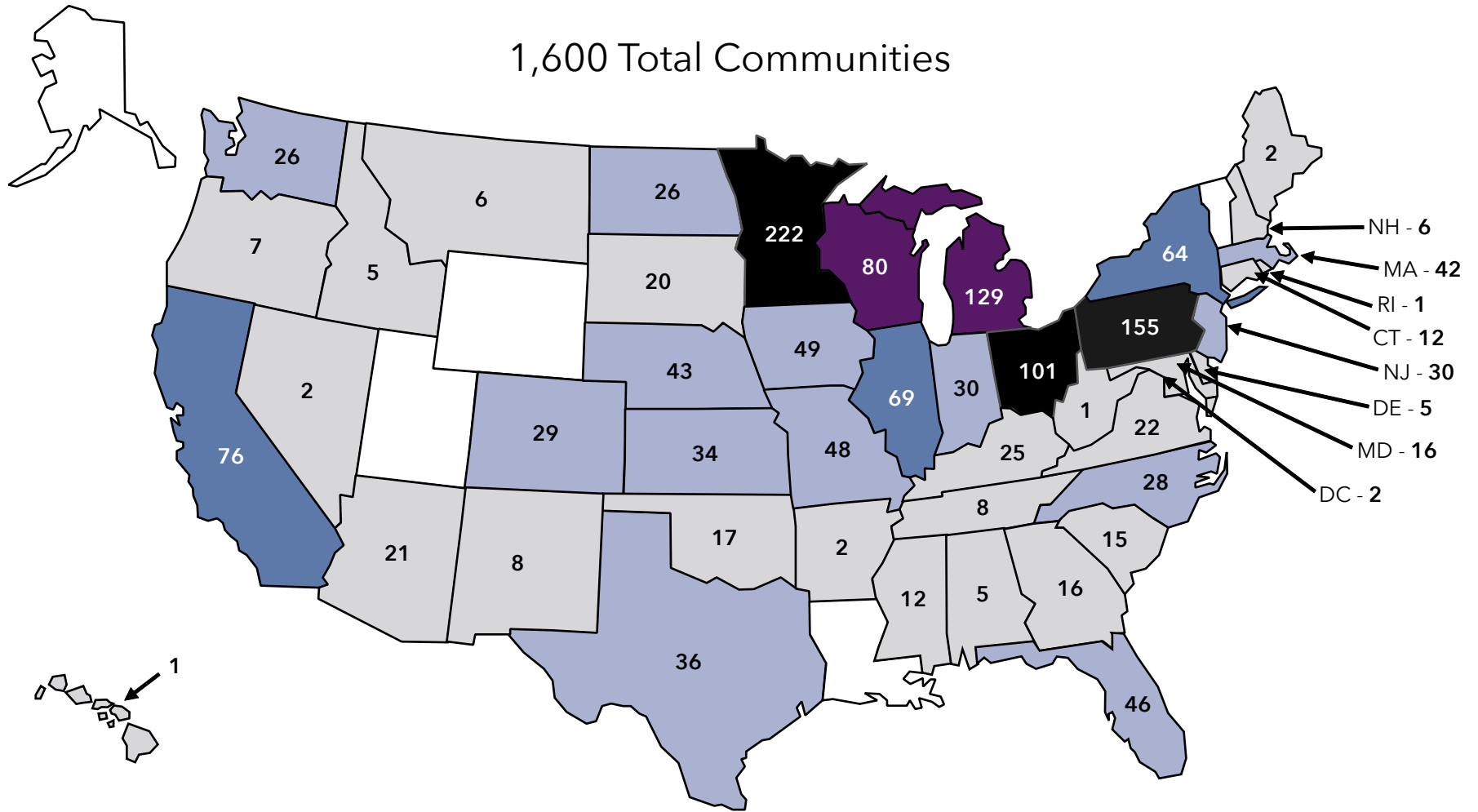
Organizational Characteristics: Locations

Top Five States by Community Type

LPC			ILF			ALF			NH		
1	PA	101	1	MN	50	1	MN	80	1	MN	59
2	OH	51	2	MI	32	2	MI	50	2	MI	28
3	CA	42	3	PA	22	3	WI	28	3	OH	25
4	IL	36	4	WI	22	4	PA	18	4	IL	22
5	FL	34	5	NY	16	5	CA	15	5	NY	22

Organizational Characteristics: Locations

Community Locations

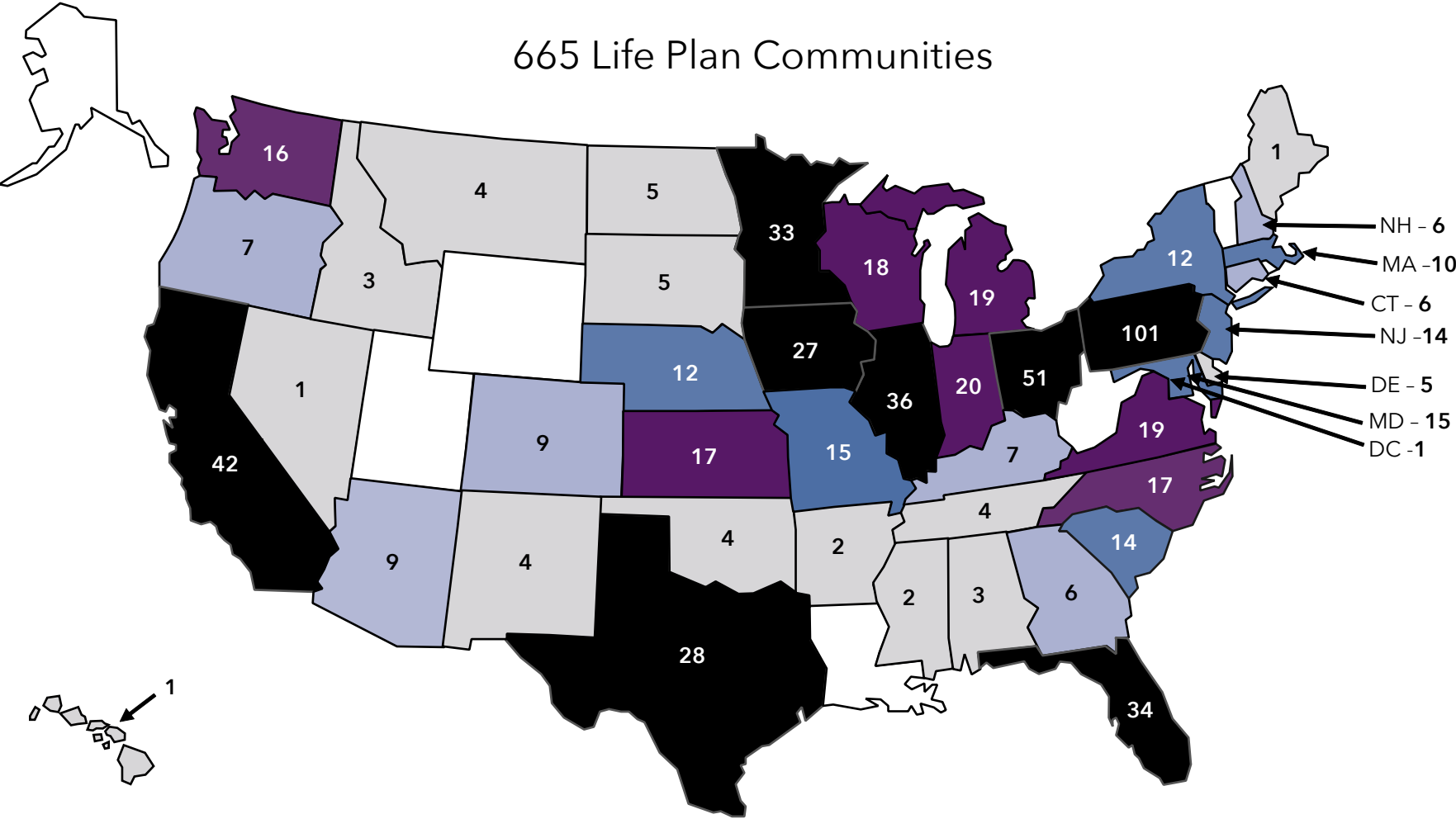


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Organizational Characteristics: Locations

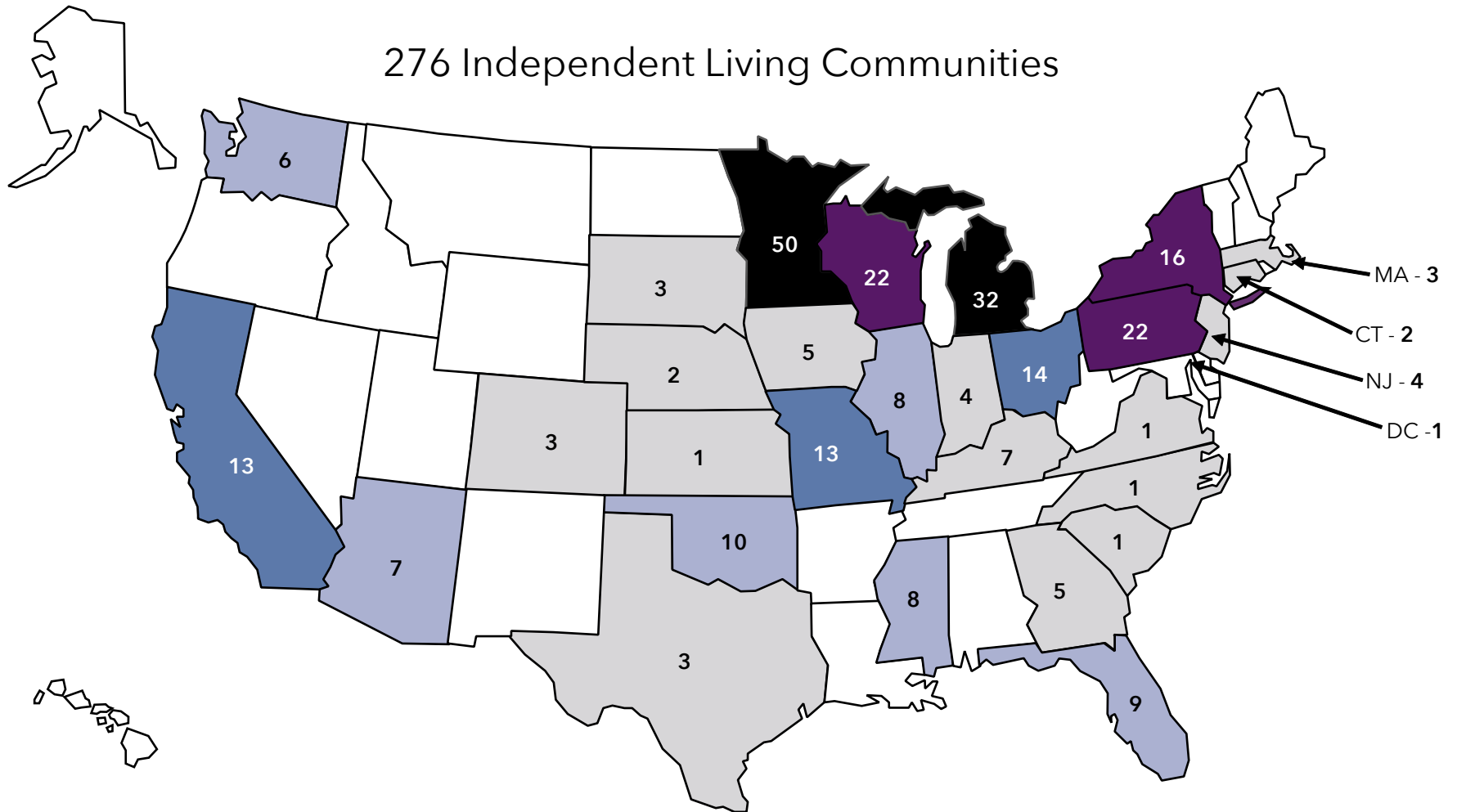
Life Plan Community (LPC) Locations



KEY:

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

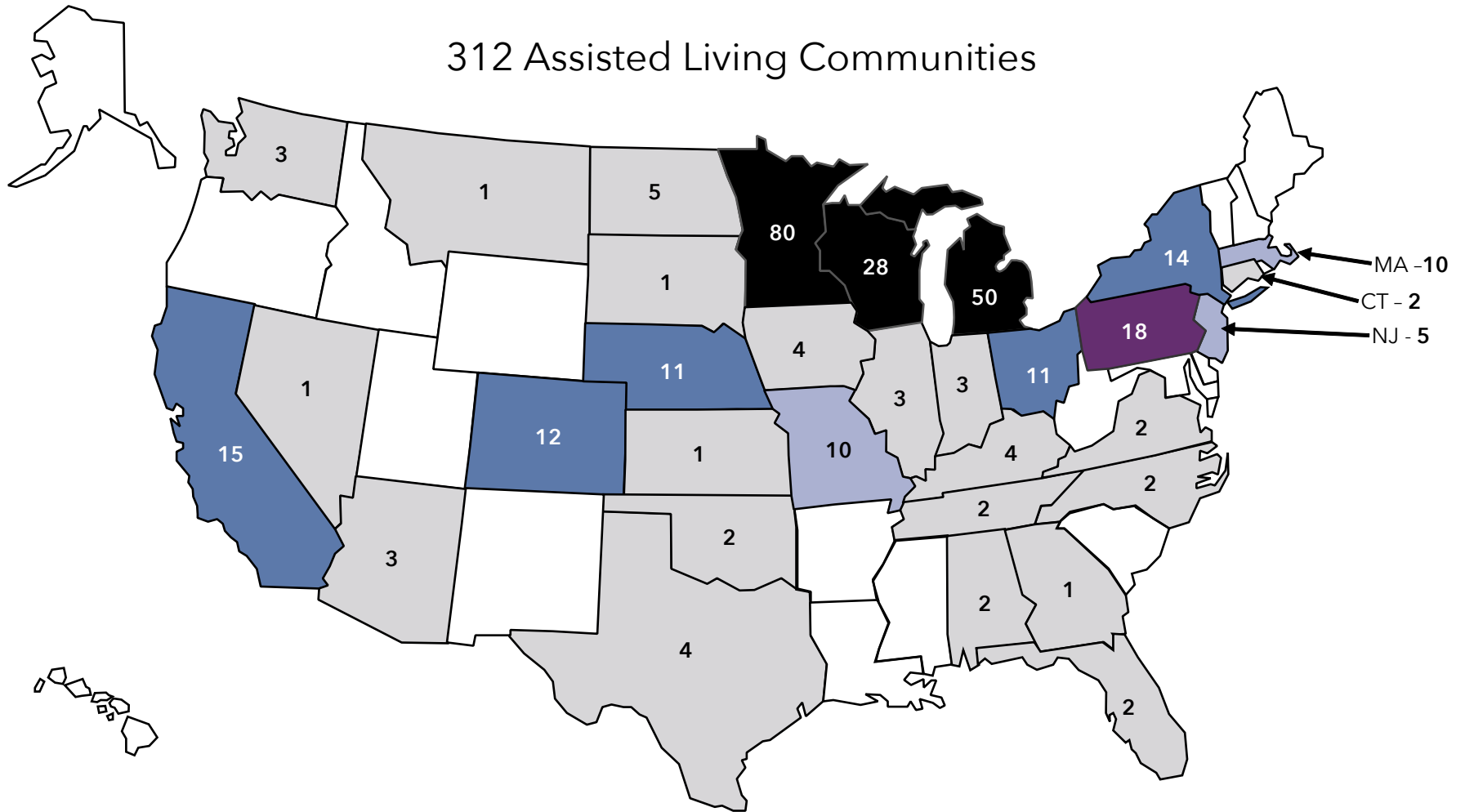
Organizational Characteristics: Locations Independent Living (IL) Community Locations



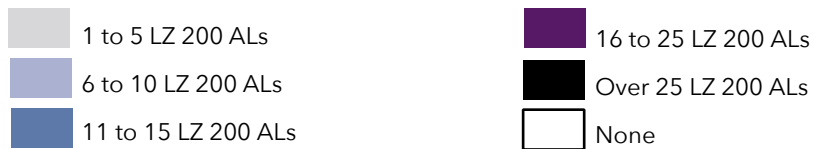
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Organizational Characteristics: Locations Assisted Living (AL) Community Locations

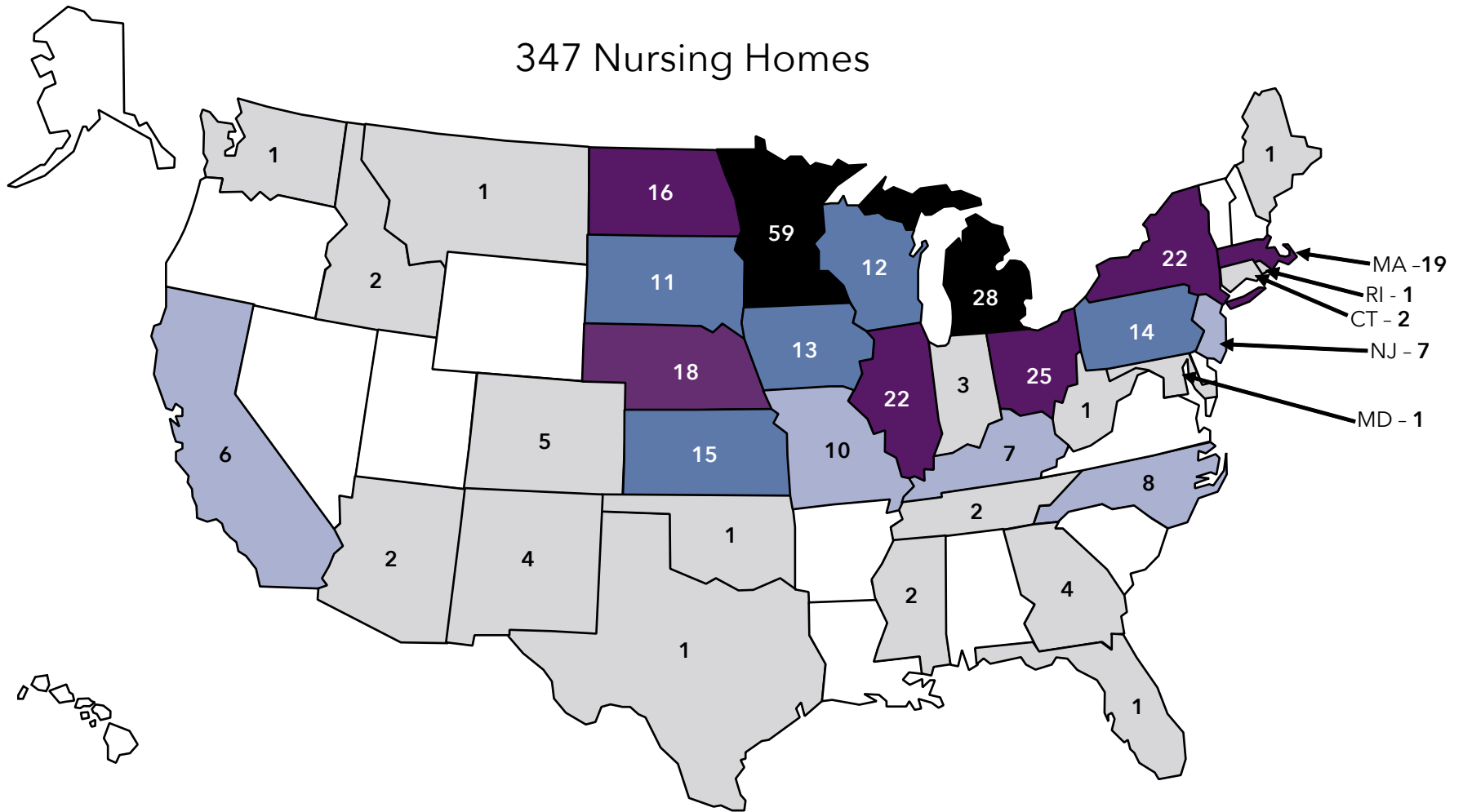


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Organizational Characteristics: Locations

Nursing Home (NH) Locations



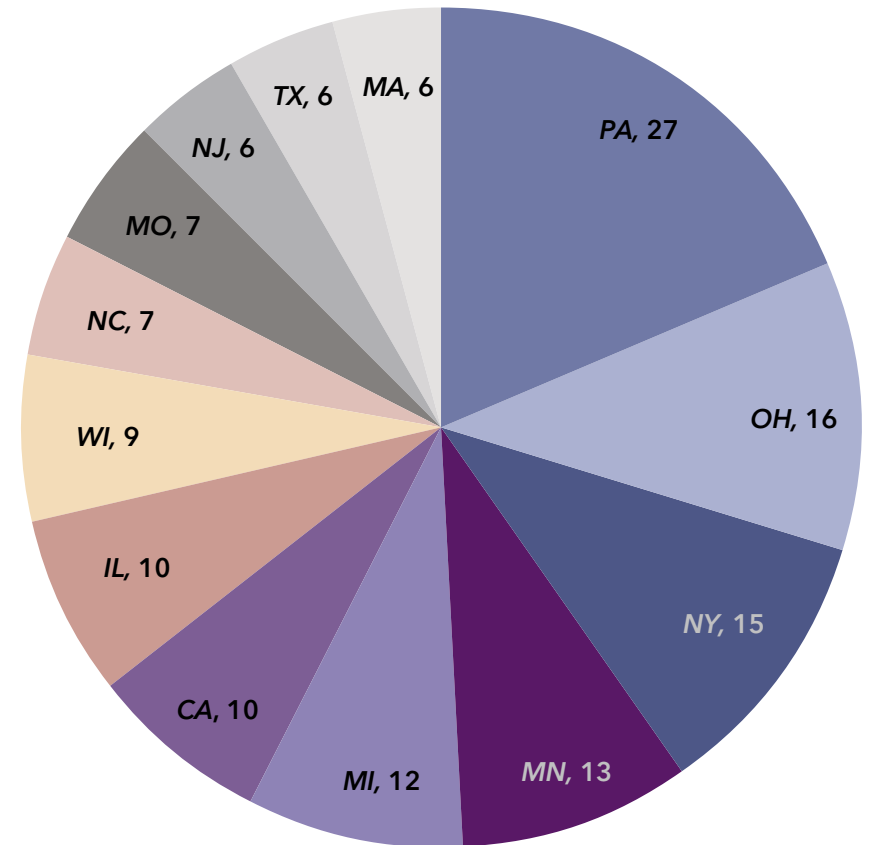
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Organizational Characteristics: System Headquarters *States with Largest Number of Headquarters' Locations*

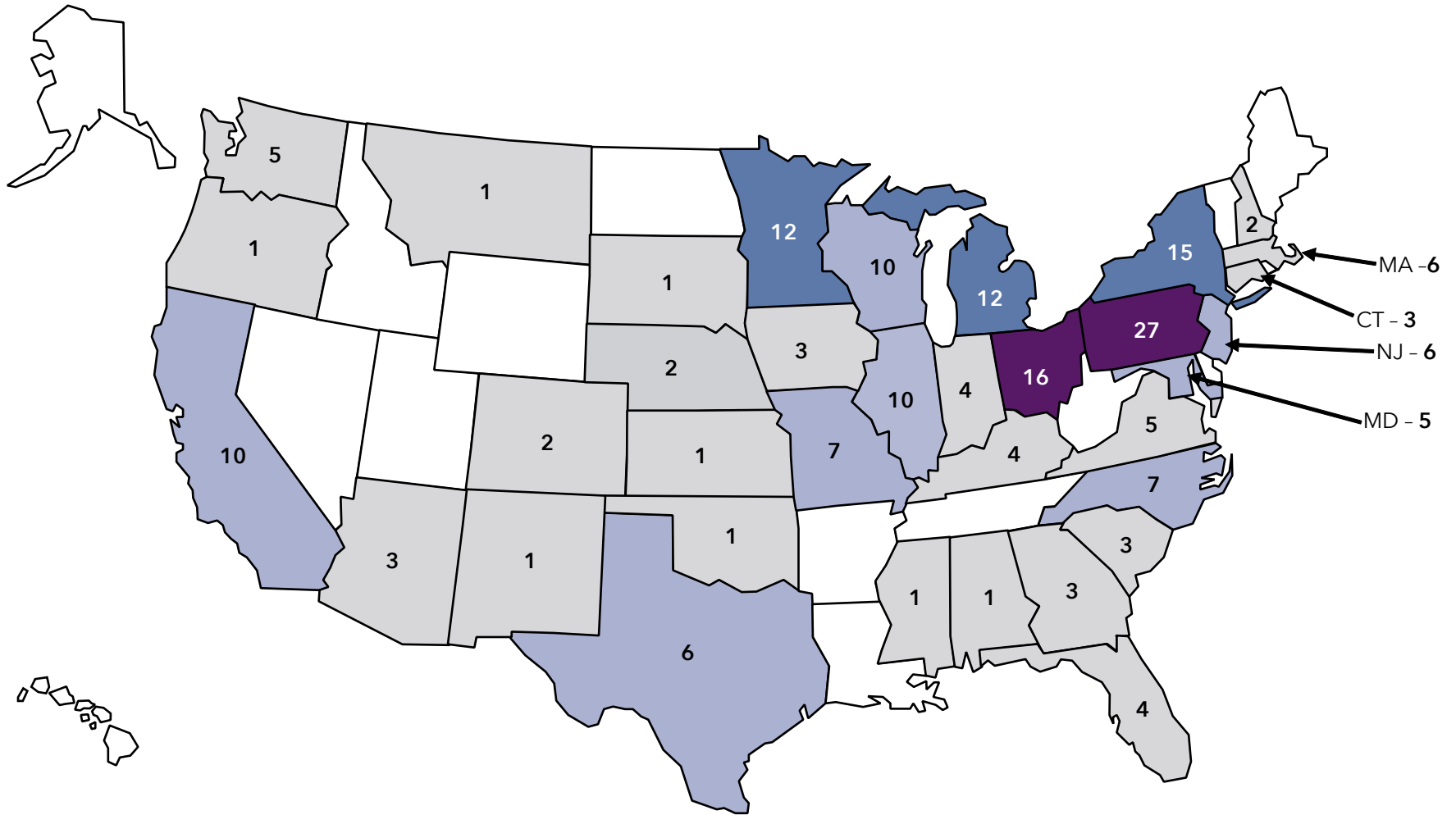
System Headquarters

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 California. Five of Pennsylvania's multi-site headquarters are among the largest 25.



Organizational Characteristics: System Headquarters

Headquarters' Locations

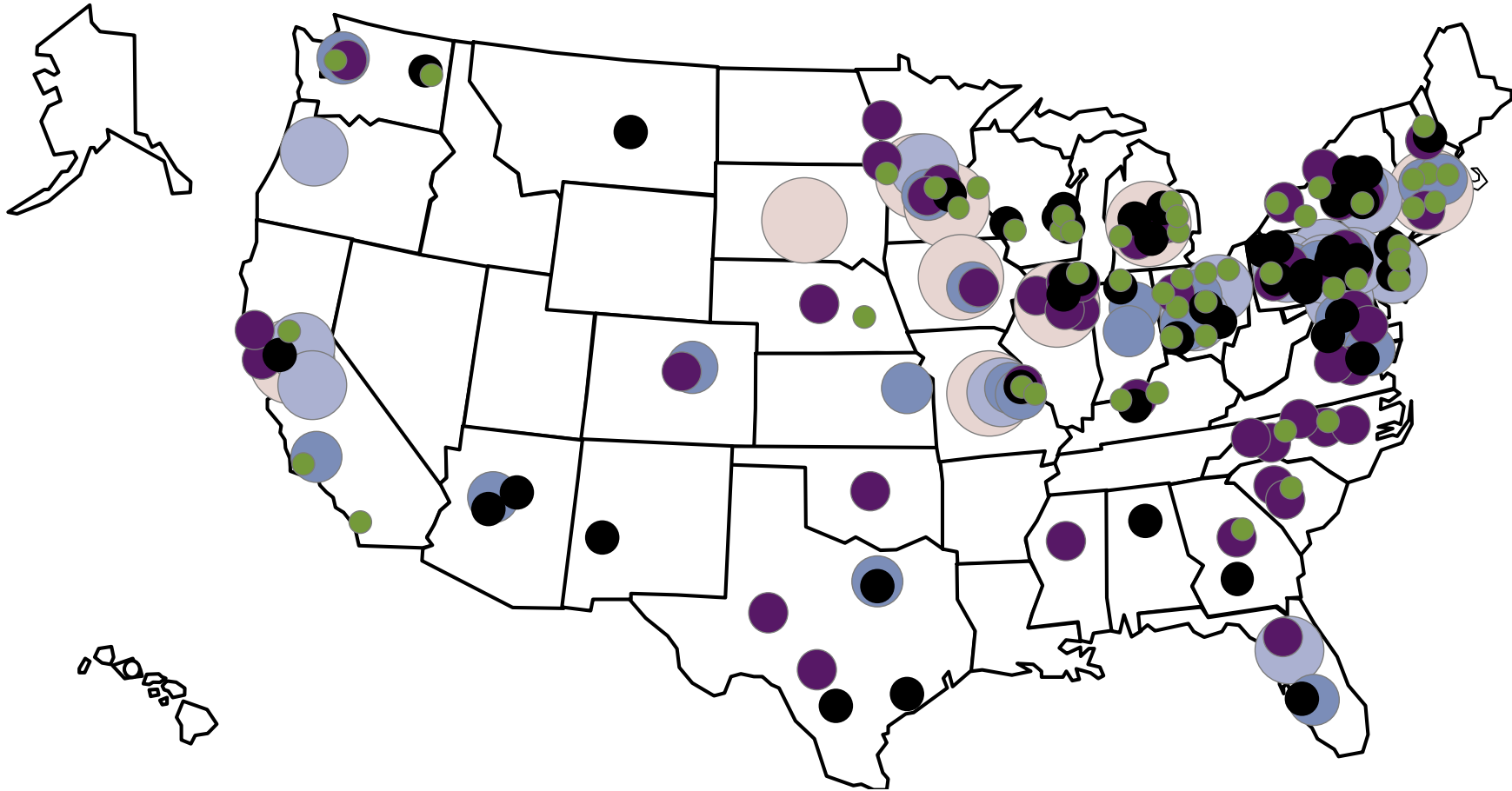


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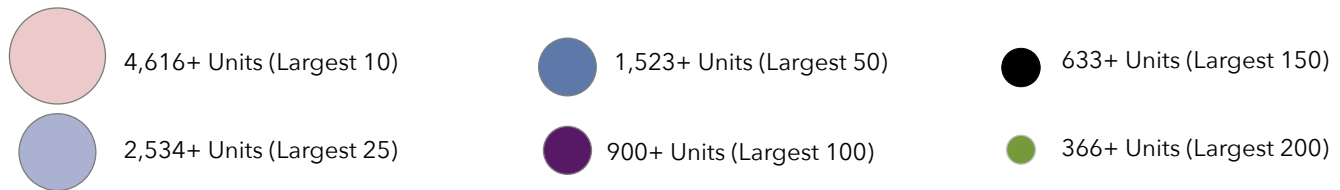


Organizational Characteristics: System Headquarters

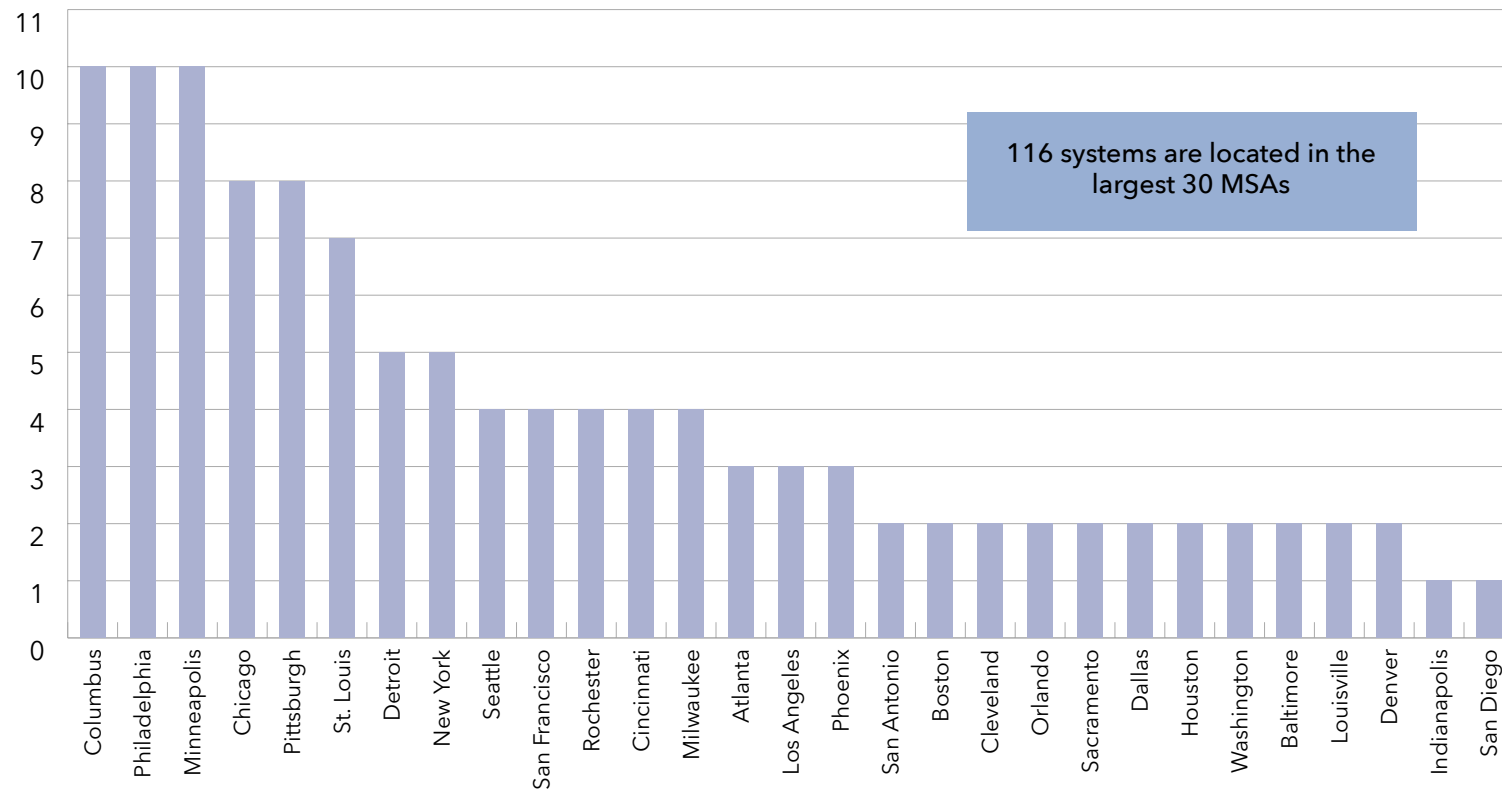
Headquarters' Locations by Size



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 2020 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 #18) – 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. Another example: HumanGood (LZ 200 #6) is classified as an across states system where its focus had been on the Pacific West Coast until their recent affiliation in the Northeast.

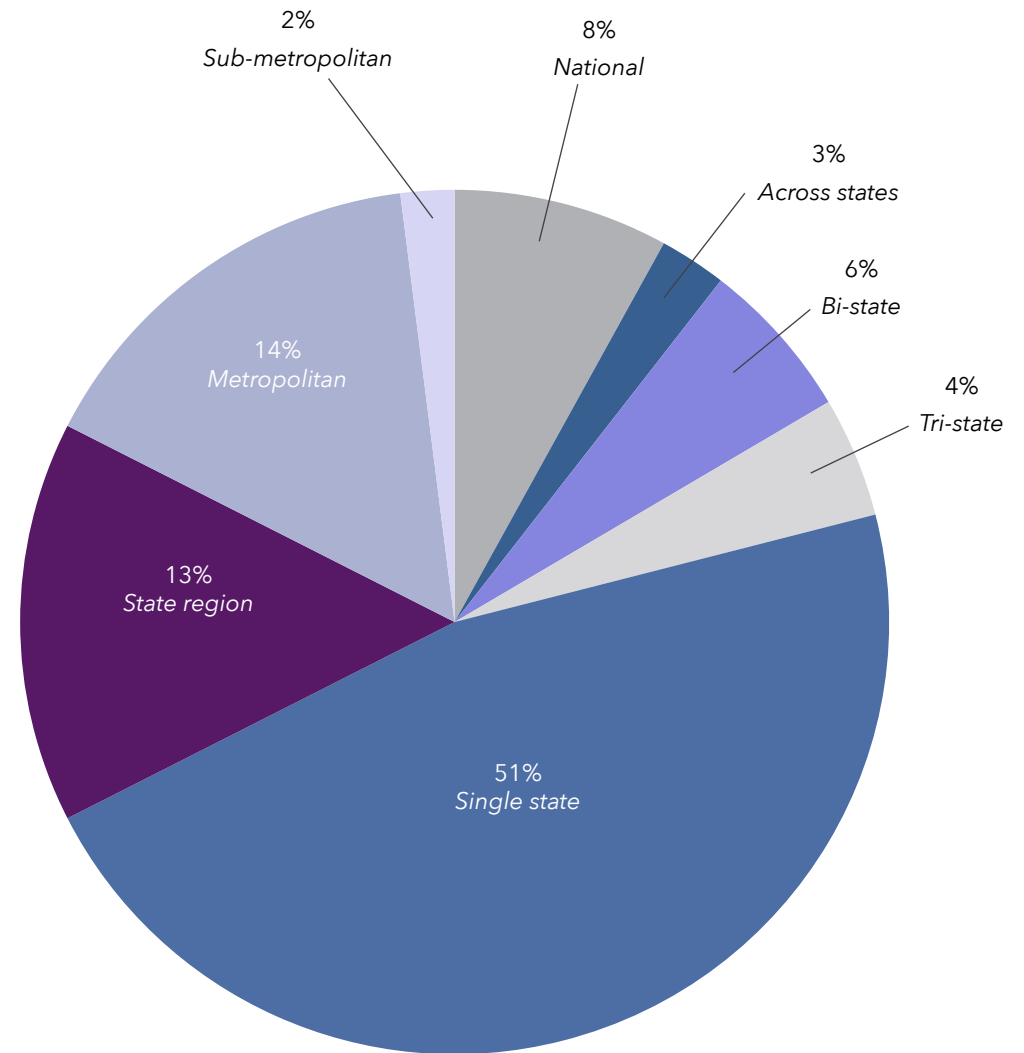
Organizational Characteristics: Geographic Classifications (Continued)

- **Tri-state.** Systems whose communities are located across three states, typically contiguous. Example: Presbyterian Senior Living (LZ 200 #17) has communities located in Delaware, Ohio and Pennsylvania
- **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 #134) – 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 #107) are in the southwestern quadrant of the DC-Arlington metropolitan area.

Organizational Characteristics: Geographic Classifications

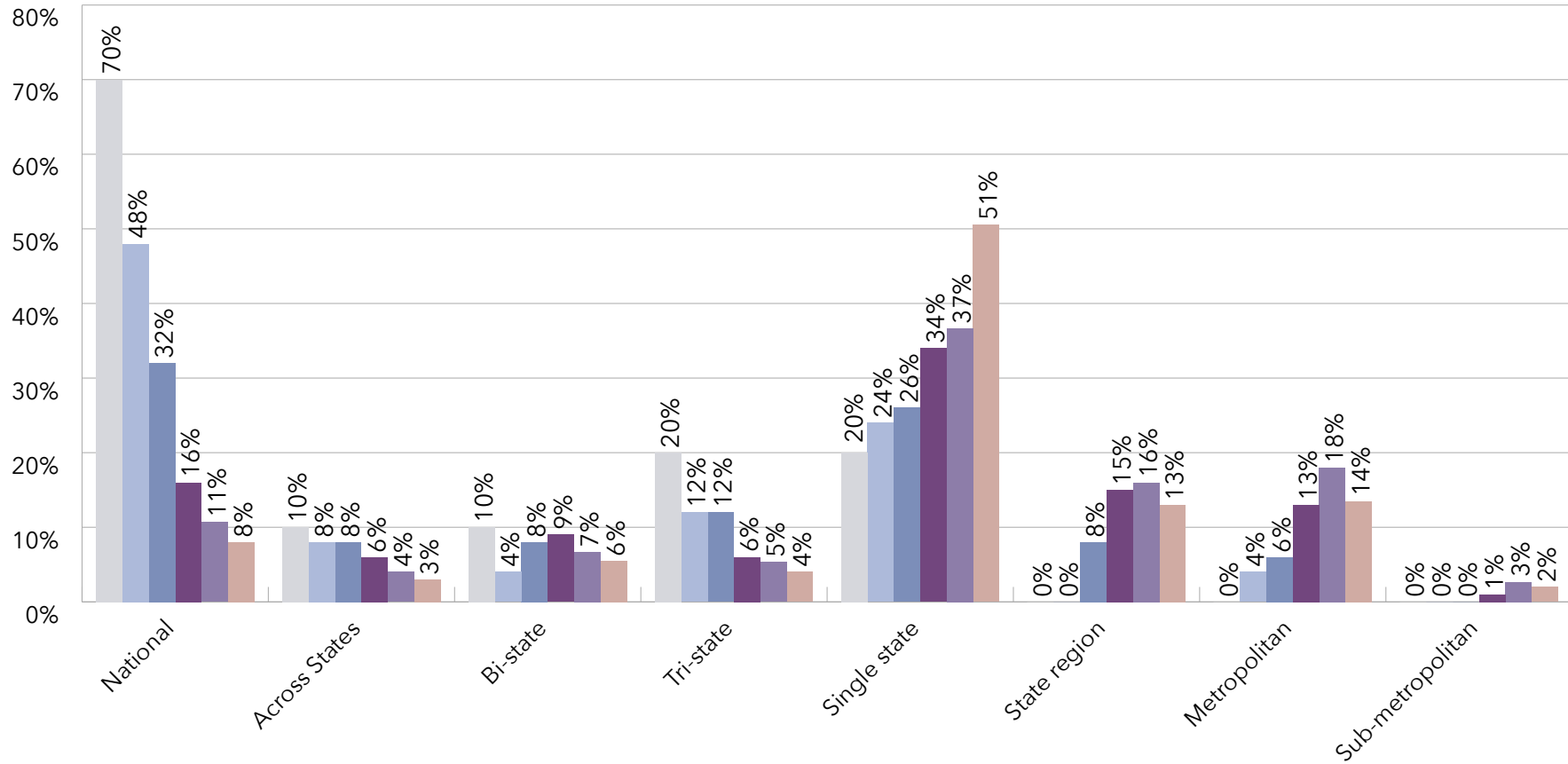
Primary Classifications

Chart 4-6a shows that a large majority, nearly 51%, 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 #15). 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 #14) has a secondary metropolitan market in St. Louis. The secondary classification provides a snapshot of a system's geographic concentration of communities. Nearly Seventy (70) 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	15
State region	Metropolitan	5
	Sub-metropolitan	1
Metropolitan	Sub-metropolitan	2
Total Organizations with Secondary Classifications		69

Organizational Characteristics: Corporate Name Changes in 2020

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.

2021 Rank	Current System Name	Logo	Previous System Name
136	Christian Health		Christian Health Care Center
143	St. John's United		St. John's Lutheran Ministries

Organizational Characteristics: Debt Ratings

Rated Debt as of 12/31/2020

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 12/31/20. 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, 52%, of the ratings for LZ 200 organizations fall in the "BBB" category (that is, with ratings of "BBB+," "BBB" or "BBB-").

2021 Rank	System Name	State	Rated	
			Fitch	S&P
123	Moorings Park	FL	A	A+
1	National Senior Campuses	MA	A	UNR
20	Otterbein SeniorLife	OH	UNR	A
24	Masonic Villages	PA	UNR	A
34	Willow Valley Communities	PA	A	UNR
43	Buckner Retirement Services, Inc	TX	A	UNR
Over 200	Three Pillars Senior Living Community	WI	A	UNR
22	Front Porch Communities and Services	CA	A	A-
3	Acts Retirement-Services, Inc.	PA	A-	UNR
6	HumanGood	CA	A-	UNR
9	Covenant Retirement Communities	IL	A-	UNR
11	Westminster Communities of Florida	FL	A-	UNR
12	Retirement Housing Foundation	CA	A-	UNR
21	The Carmelite System	NY	A-	UNR
60	Covia Communities	CA	A-	UNR

Organizational Characteristics: Debt Ratings (Continued)

Rated Debt as 12/31/2020

2021 Rank	System Name	State	Rated	
			Fitch	S&P
95	The RiverWoods Group	NH	A-	UNR
106	Sun Health Services	AZ	A-	UNR
133	Emerald Communities	WA	A-	UNR
161	Episcopal Communities & Services	CA	A-	UNR
66	Immanuel	NE	AA	UNR
23	Concordia Lutheran Ministries	PA	UNR	AA-
16	Presbyterian Senior Living	PA	BBB+	UNR
25	Springpoint Senior Living	NJ	BBB+	UNR
28	Shell Point Retirement Community	FL	UNR	BBB+
33	Diakon Lutheran Social Ministries	PA	BBB+	UNR
55	Presbyterian Homes	IL	BBB+	UNR
58	Masonicare	CT	BBB+	UNR
84	The Presbyterian Homes, Inc.	NC	BBB+	UNR
100	Givens Estates	NC	BBB+	UNR
107	Goodwin House Incorporated	VA	BBB+	UNR
121	Sunnyside Presbyterian Home	VA	BBB+	UNR
177	Lutheran Social Ministries of New Jersey, Inc.	NJ	BBB+	UNR
8	Lifespace Communities, Inc.	IA	BBB	UNR
14	Lutheran Senior Services	MO	BBB	UNR
15	Asbury Communities, Inc.	MD	BBB	UNR
19	Ohio Living	OH	BBB	UNR
45	Eskaton	CA	UNR	BBB
47	BHI Senior Living, Inc.	IN	BBB	UNR
50	Bethesda Health Group	MO	BBB	UNR
63	Lifespire of Virginia	VA	BBB	UNR

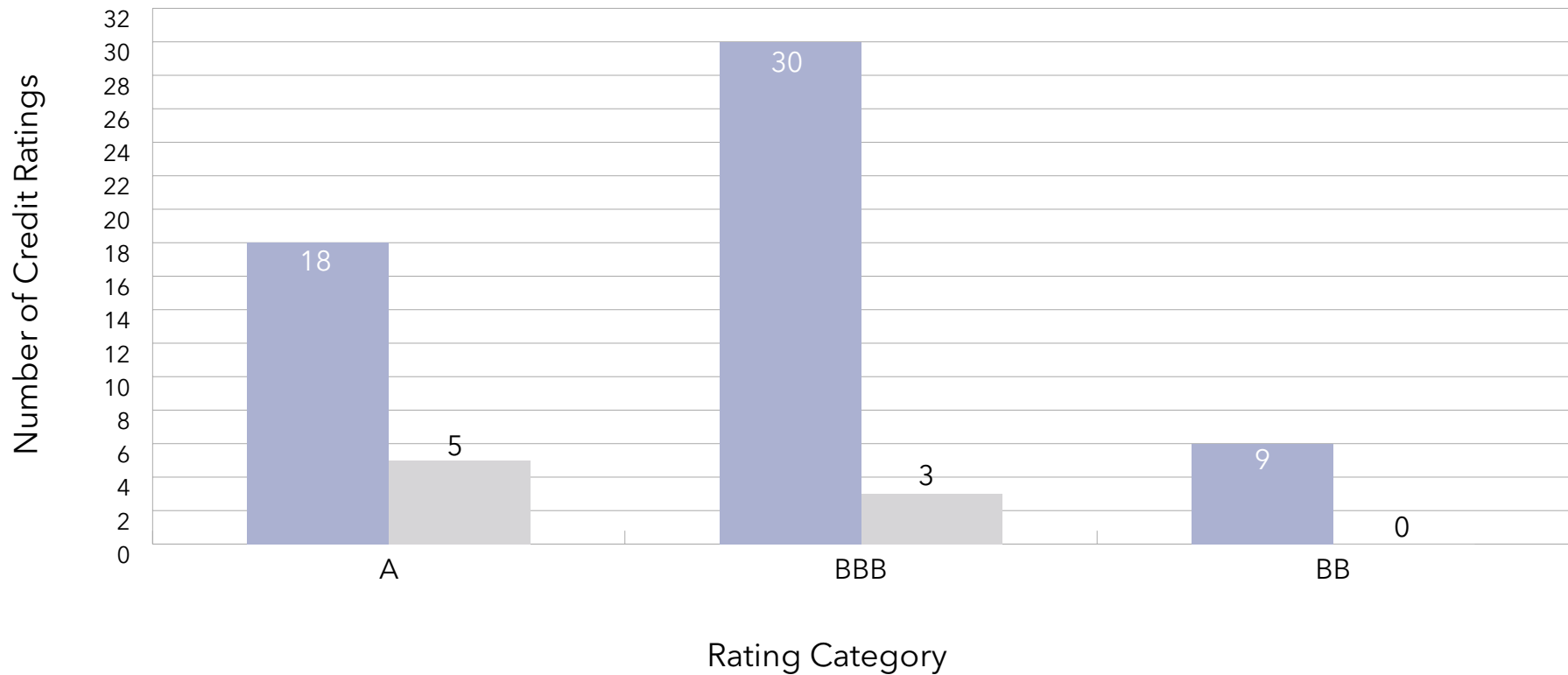
Organizational Characteristics: Debt Ratings (Continued)

Rated Debt as of 12/31/2020

2021 Rank	System Name	State	Rated	
			Fitch	S&P
91	The United Methodist Retirement Homes, Inc.	NC	BBB	UNR
185	The Loomis Communities	MA	UNR	BBB
29	Christian Horizons	MO	BBB-	UNR
42	Franciscan Communities, Inc.	IL	BBB-	UNR
69	UMRC and Porter Hills	MI	BBB-	UNR
70	Holland Home	MI	BBB-	UNR
82	Life Enriching Communities	OH	BBB-	UNR
101	Haverland Carter Lifestyle Group	NM	BBB-	UNR
103	United Methodist Communities	NJ	BBB-	UNR
115	Landis Communities	PA	BBB-	UNR
116	Messiah Lifeways	PA	BBB-	UNR
129	Brazos Presbyterian Homes	TX	BBB-	UNR
158	Friends Homes, Inc.	NC	BBB-	UNR
175	Judson Services	OH	BBB-	UNR
36	Greencroft Communities	IN	BB+	UNR
73	Friendship Village of St. Louis	MO	BB+	UNR
88	Blue Skies of Texas	TX	BB+	UNR
135	Morningside Ministries	TX	BB+	UNR
Over 200	Morningstar Senior Living	PA	BB+	UNR
27	Transforming Age	WA	BB	UNR
62	Presbyterian Villages of Michigan	MI	BB	UNR
67	Wesley Enhanced Living	PA	BB	UNR
169	EHM Senior Solutions	MI	BB	UNR

Organizational Characteristics: Debt Ratings

Ratings by Category



56 ratings in "A" & "BBB" Category
9 in "BB" Category
65 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 2020, organizations were grouped into tiers based on their overall revenue. The largest LZ 200 organizations have revenues beyond \$200 million (21 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	21	14.5%
Tier II: \$100-\$199 million	24	16.6%
Tier III: \$50-\$99 million	61	42.1%
Tier IV: \$25-\$49 million	33	22.8%
Tier V: < \$25 million	6	4.1%

n = 145

Analysis of the Data: Revenue

Annual Revenue by Organization

2021 Rank	System	State	Annual Revenue Tier
1	National Senior Campuses, Inc.	MA	Tier I
7	Trinity Health Senior Communities	MI	Tier I
3	ACTS Retirement Services, Inc.	PA	Tier I
6	HumanGood	CA	Tier I
4	Presbyterian Homes and Services	MN	Tier I
8	Lifespace Communities, Inc.	IA	Tier I
9	Covenant Living Communities & Services	IL	Tier I
10	Benedictine	MN	Tier I
15	Asbury Communities, Inc.	MD	Tier I
13	The Kendal Corporation	PA	Tier I
18	Pacific Retirement Services	OR	Tier I
33	Diakon Lutheran Social Ministries	PA	Tier I
49	Hebrew SeniorLife	MA	Tier I
21	The Carmelite System, Inc.	NY	Tier I
16	Presbyterian Senior Living	PA	Tier I
11	Westminster Communities of Florida	FL	Tier I
23	Concordia Lutheran Ministries	PA	Tier I
14	Lutheran Senior Services	MO	Tier I
19	Ohio Living	OH	Tier I
25	Springpoint Senior Living Inc.	NJ	Tier I
27	Transforming Age	WA	Tier I
111	The New Jewish Home	NY	Tier II
62	Presbyterian Villages of Michigan	MI	Tier II
20	Otterbein SeniorLife	OH	Tier II
58	Masonicare	CT	Tier II

Tier I: > \$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

2021 Rank	System	State	Annual Revenue Tier
60	Covia Communities	CA	Tier II
70	Holland Home	MI	Tier II
48	Presbyterian SeniorCare Network	PA	Tier II
45	Eskaton	CA	Tier II
80	Lutheran SeniorLife	PA	Tier II
69	UMRC and Porter Hills	MI	Tier II
28	Shell Point Retirement Community	FL	Tier II
56	Lutheran Life Communities	IL	Tier II
55	Presbyterian Homes	IL	Tier II
30	Presbyterian Manors of Mid-America, Inc.	KS	Tier II
74	Phoebe Ministries	PA	Tier II
57	Lutheran Services Carolinas	NC	Tier II
37	WesleyLife	IA	Tier II
187	St. Paul's Senior Services	CA	Tier II
54	Providence Life Services	IL	Tier II
34	Willow Valley Communities	PA	Tier II
42	Franciscan Communities	IL	Tier II
41	United Church Homes, Inc.	OH	Tier II
35	Homewood Retirement Centers, Inc.	MD	Tier II
127	Samaritas	MI	Tier II
50	Bethesda Health Group, Inc.	MO	Tier III
107	Goodwin House Incorporated	VA	Tier III
123	The Moorings, Incorporated	FL	Tier III
63	LifeSpire of Virginia	VA	Tier III
79	Ingleside	MD	Tier III

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

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2021 Rank	System	State	Annual Revenue Tier
68	American Baptist Homes of the Midwest	MN	Tier III
65	National Lutheran Communities and Services	MD	Tier III
43	Buckner Retirement Services, Inc.	TX	Tier III
59	Methodist Retirement Communities	TX	Tier III
77	Pinnacle Living	VA	Tier III
90	Liberty Lutheran Services	PA	Tier III
83	Lutheran Homes of South Carolina	SC	Tier III
91	The United Methodist Retirement Homes, Inc.	NC	Tier III
75	Eventide	MN	Tier III
47	BHI Senior Living, Inc.	IN	Tier III
136	Christian Health fka Christian Health Care Center	NJ	Tier III
36	Greencroft Communities	IN	Tier III
93	United Church Homes and Services	NC	Tier III
61	SantaFe Senior Living Inc.	FL	Tier III
92	Saint Therese	MN	Tier III
97	Christian Living Communities	CO	Tier III
159	Ebenezer Society	MN	Tier III
103	United Methodist Communities	NJ	Tier III
76	United Methodist Homes	NY	Tier III
84	The Presbyterian Homes, Inc.	NC	Tier III
99	St. Ann's of Greater Rochester, Inc.	NY	Tier III
106	Sun Health Services	AZ	Tier III
82	Life Enriching Communities	OH	Tier III
78	Friendship Senior Options	IL	Tier III
40	Bethesda Senior Living Communities	CO	Tier III

Tier I: > \$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

2021 Rank	System	State	Annual Revenue Tier
113	Presbyterian Homes of Georgia	GA	Tier III
31	Christian Care Companies	AZ	Tier III
96	Wesley	WA	Tier III
100	Givens Communities	NC	Tier III
98	St. John's	NY	Tier III
53	Mississippi Methodist Senior Services, Inc.	MS	Tier III
73	Friendship Villages of St. Louis	MO	Tier III
160	Episcopal Communities & Services	CA	Tier III
71	Western Home Services Inc.	IA	Tier III
177	Lutheran Social Ministries of New Jersey, Inc.	NJ	Tier III
133	Emerald Communities	WA	Tier III
117	Methodist Homes of Alabama & Northwest Florida	AL	Tier III
89	Presbyterian Communities of South Carolina	SC	Tier III
95	The RiverWoods Group	NH	Tier III
179	Knute Nelson	MN	Tier III
102	Masonic Homes Kentucky	KY	Tier III
126	United Church of Christ Homes	PA	Tier III
85	Christian Care Communities	KY	Tier III
112	Lutheran Social Ministries of Maryland	MD	Tier III
104	St. Andrew's Resources for Seniors System	MO	Tier III
101	Haverland Carter Lifestyle Group	NM	Tier III
154	Genacross Lutheran Services	OH	Tier III
108	Mather	IL	Tier III
143	St. John's United aka St. John's Lutheran Ministries, Inc.	MT	Tier III
194	Community First Solutions	OH	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

2021 Rank	System	State	Annual Revenue Tier
88	Blue Skies of Texas	TX	Tier III
110	Living Branches	PA	Tier III
105	Menno Haven, Inc.	PA	Tier III
116	Messiah Lifeways	PA	Tier III
145	Baptist Homes Society	PA	Tier III
148	Smith Senior Living	IL	Tier III
51	Baptist Village Communities	OK	Tier IV
121	Sunnyside Communities	VA	Tier IV
115	Landis Communities	PA	Tier IV
131	The Ohio Masonic Home	OH	Tier IV
163	Friendly Senior Living	NY	Tier IV
109	Garden Spot Communities	PA	Tier IV
146	Maple Knoll Communities, Inc.	OH	Tier IV
180	Deaconess Abundant Life Communities	MA	Tier IV
193	A.G.Rhodes	GA	Tier IV
135	Morningside Ministries	TX	Tier IV
86	Baruch Senior Ministries	MI	Tier IV
134	Episcopal SeniorLife Communities	NY	Tier IV
130	Benevolent Corporation Cedar Community	WI	Tier IV
129	Brazos Presbyterian Homes	TX	Tier IV
170	Lutheran Life Villages	IN	Tier IV
128	Christian Care Centers, Inc.	TX	Tier IV
171	Redstone Presbyterian SeniorCare	PA	Tier IV
189	Beechwood Health Care Center, Inc.	NY	Tier IV
172	LindenGrove Communities	WI	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

2021 Rank	System	State	Annual Revenue Tier
186	Good Shepherd Communities, Inc.	NY	Tier IV
167	Medford Leas	NJ	Tier IV
139	Sunset Senior Communities	MI	Tier IV
199	Parker	NJ	Tier IV
132	Bethany Lutheran Homes, Inc.	WI	Tier IV
153	Baptist Retirement Homes of North Carolina, Inc.	NC	Tier IV
118	Wesley Willows	IL	Tier IV
12	Retirement Housing Foundation	CA	Tier IV
141	United Lutheran Program for the Aging, Inc.	WI	Tier IV
183	The Lutheran Home and Harwood Place	WI	Tier IV
174	Rockwood Retirement Communities	WA	Tier IV
122	Vista Prairie Communities	MN	Tier IV
138	LifeStream Complete Senior Living, Inc.	AZ	Tier IV
182	Allegheny Lutheran Social Ministries Inc.	PA	Tier IV
200	ACC Senior Services	CA	Tier V
198	Jewish Senior Life of Metropolitan Detroit	MI	Tier V
176	Bethany St. Joseph Corporation	WI	Tier V
196	Clark Retirement Community, Inc.	MI	Tier V
192	Skaalen Retirement Services	WI	Tier V
67	Wesley Enhanced Living	PA	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 2020

Corporate Staff

Yet another area of the 2021 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 Information/Technology Officer	6
Chief Revenue Officer	4
Chief Financial Officer/Finance Manager	3
Chief Life Officer/Home Health & Hospice Executive	3
Chief Operating Officer	3
Chief Administrative Officer	2
Chief Human Resource/Chief People Officer	2
Corporate Director of Facilities	2
Director of Capital Projects	2
Director of Healthcare Marketing	2
Director of Wellness/Culinary Operations	2

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

2021 Rank	System Name	State	Current (YE 2020)	Previous
CEO				
14	Lutheran Senior Services	MO	Garry Anderson	John Kotovsky
18	Pacific Retirement Services	OR	Eric Sholty	Brian McLemore
33	Diakon Lutheran Social Ministries	PA	Scott Habecker	Mark Pile
56	Lutheran Life Communities	IL	Sloan Bentley	Jesse Jantzen
89	Presbyterian Communities of South Carolina	SC	L. Franklin Fant	Katherine Ligon
197	Jewish Senior Life of Metropolitan Detroit	MI	Nancy Heinrich	Jennie Klepinger
CFO				
8	Lifespace Communities, Inc.	IA	Nick Harshfield	Larry Smith
9	Covenant Living Communities & Services	IL	Jeannie Justie	Jody Holt
33	Diakon Lutheran Social Ministries	PA	Jarrod Leo	Scott Habecker
53	Mississippi Methodist Senior Services, Inc.	MS	Jim Zuelzke	Christie Vance
56	Lutheran Life Communities	IL	James Buckman	Marie D. Carlson
58	Masonicare	CT	Steven Beaulieu	Jim Rude
93	United Church Homes and Services	NC	John White	Gary Shull
106	Sun Health Services	AZ	Sharon Grambow	Tahlya Visintainer
115	Landis Communities	PA	Corey Hamilton	Eric Bender
133	Emerald Communities	WA	Matt McArthur	Al Chambard
152	Baptist Retirement Homes of North Carolina, Inc.	NC	Scott Farkas	Jeannine Richman

Analysis of the Data: Corporate Structure (Continued)

Corporate Staffing Changes

2021 Rank	System Name	State	Current (YE 2020)	Previous
COO				
8	Lifespace Communities, Inc.	IA	Eddie Fenoglio, Jr	Ann Walsh
16	Asbury Communities, Inc.	MD	Vacant	Sue DaCamara
19	Ohio Living	OH	Vacant	Daniel O'Connor
33	Diakon Lutheran Social Ministries	PA	Shari Vandergast	Scott Habecker
40	Bethesda Senior Living Communities	CO	Rick Summers	Larry W. Smith
42	Franciscan Communities	IL	Zachary Zerbonia	John Glover
45	Eskaton	CA	Vacant	Betsy Donovan
53	Mississippi Methodist Senior Services, Inc.	MS	Christie Vance	Alan Brown
56	Lutheran Life Communities	IL	John Couture	Lori Smith
59	Methodist Retirement Communities	TX	Matthew Currie	Amy Thomas
79	Ingleside	MD	Christine Podles	Timothy L. Myers
103	United Methodist Communities	NJ	David Rayha	Carol McKinley
131	The Ohio Masonic Home	OH	Vacant	David Subleski
152	Baptist Retirement Homes of North Carolina, Inc.	NC	Jessica McCollum	Debbie Meginnis
182	The Lutheran Home and Harwood Place	WI	Lindsey Kriete	Kathy Cavrs
CIO/CTO				
32	Ecumen	MN	Vacant	Bill McGarry
78	United Methodist Homes	NY	Vacant	Randy Reynolds
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	10.32	144
CFO	7.66	142
COO	4.93	82
CIO	5.58	83

* 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 177 communities within the LZ 200 are accredited through CARF; 27 have sought accreditation through JCAHO, and an additional 31 are accredited through EAGLE.

Organizational Characteristics: Accreditation (Continued)

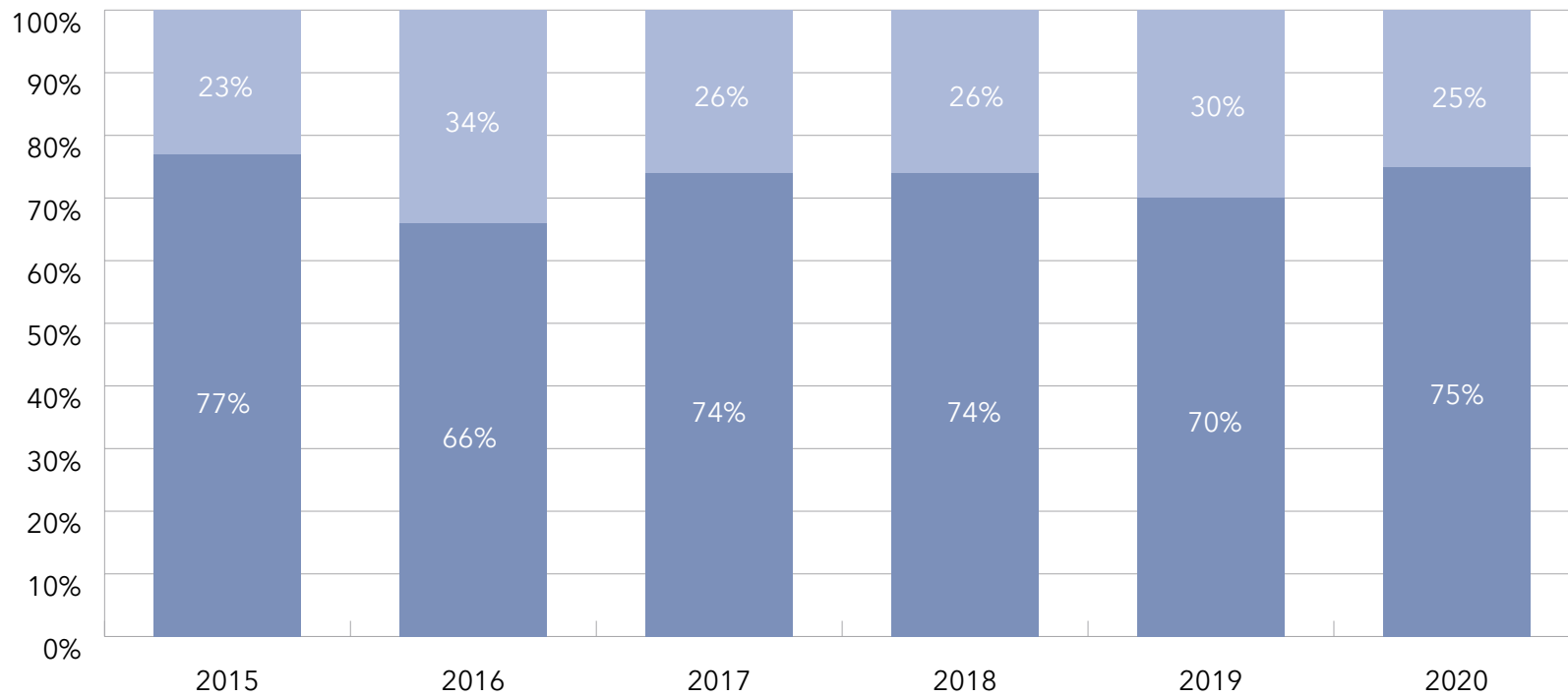
Accredited Communities

2021 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
16	Presbyterian Senior Living	PA	41	0	0
3	ACTS Retirement Services, Inc.	PA	26	0	0
48	Presbyterian SeniorCare Network	PA	20	0	0
23	Concordia Lutheran Ministries	PA	14	0	0
13	The Kendal Corporation	PA	9	2	0
39	National Church Residences	OH	9	0	0
25	Springpoint Senior Living Inc.	NJ	7	1	0
15	Asbury Communities, Inc.	MD	6	0	6
77	Pinnacle Living	VA	4	0	0
47	BHI Senior Living, Inc.	IN	3	0	0
55	Presbyterian Homes	IL	3	0	0
79	Ingleside	MD	3	0	0
84	The Presbyterian Homes, Inc.	NC	3	0	0
171	Redstone Presbyterian SeniorCare	PA	3	0	0
88	Blue Skies of Texas	TX	2	1	0
174	Rockwood Retirement Communities	WA	2	0	2
49	Hebrew SeniorLife	MA	2	0	0
182	Allegheny Lutheran Social Ministries Inc.	PA	2	0	0
78	Friendship Senior Options	IL	2	0	0
100	Givens Communities	NC	2	0	0
107	Goodwin House Incorporated	VA	2	0	0
148	Smith Senior Living	IL	2	0	0

2021 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
167	Medford Leas	NJ	2	0	0
1	National Senior Campuses, Inc.	MA	1	1	0
46	Covenant Health	MA	1	1	0
118	Wesley Willows	IL	1	0	1
58	Masonicare	CT	1	0	0
95	The RiverWoods Group	NH	1	0	0
115	Landis Communities	PA	1	0	0
112	Lutheran Social Ministries of Maryland	MD	1	0	0
123	The Moorings, Incorporated	FL	1	0	0
54	Providence Life Services	IL	0	7	0
42	Franciscan Communities	IL	0	6	0
56	Lutheran Life Communities	IL	0	2	0
111	The New Jewish Home	NY	0	2	0
180	Deaconess Abundant Life Communities	MA	0	1	0
21	The Carmelite System, Inc.	NY	0	1	0
31	Christian Care Companies	AZ	0	1	0
136	Christian Health fka Christian Health Care Center	NJ	0	1	0
20	Otterbein SeniorLife	OH	0	0	14
103	United Methodist Communities	NJ	0	0	4
69	UMRC and Porter Hills	MI	0	0	3
28	Shell Point Retirement Community	FL	0	0	1

Organizational Characteristics: Accreditation

At Least One Accredited Community



n = 149

KEY:

Not Accredited
 Accredited

177 Accredited Communities through CARF

27 Accreditations through JCAHO

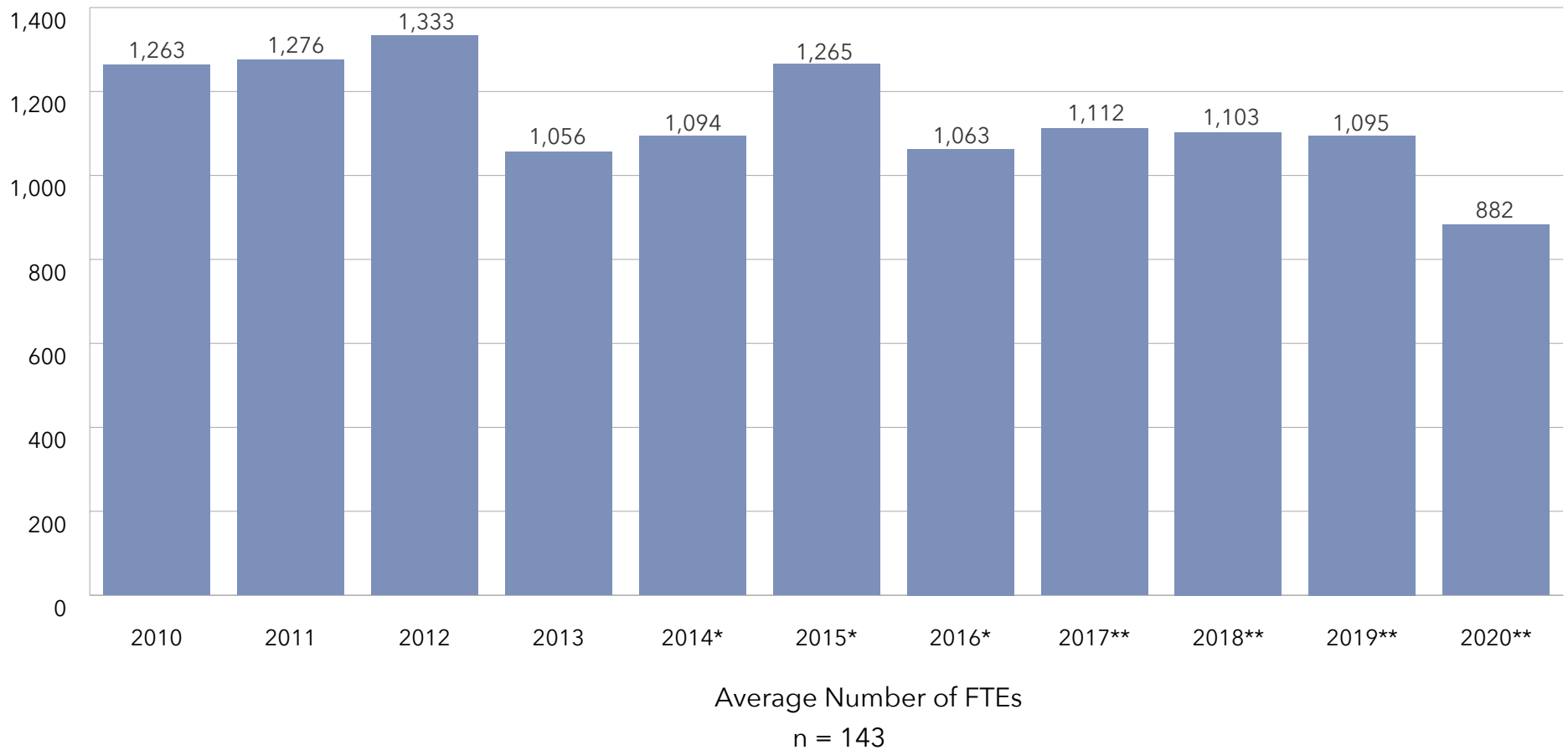
31 Accreditations through EAGLE

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

Organizational Characteristics: Staffing

Average Number of Employees, 2010-2020

2020** Average FTE/Resident: .54



2010-2012 reflect changes to the largest 100.

*2013-2016 reflect changes to the largest 150.

**2017-2020 reflect changes to the largest 200.

Analysis of the Data: Staffing

Summary of Employees, 2010-2020

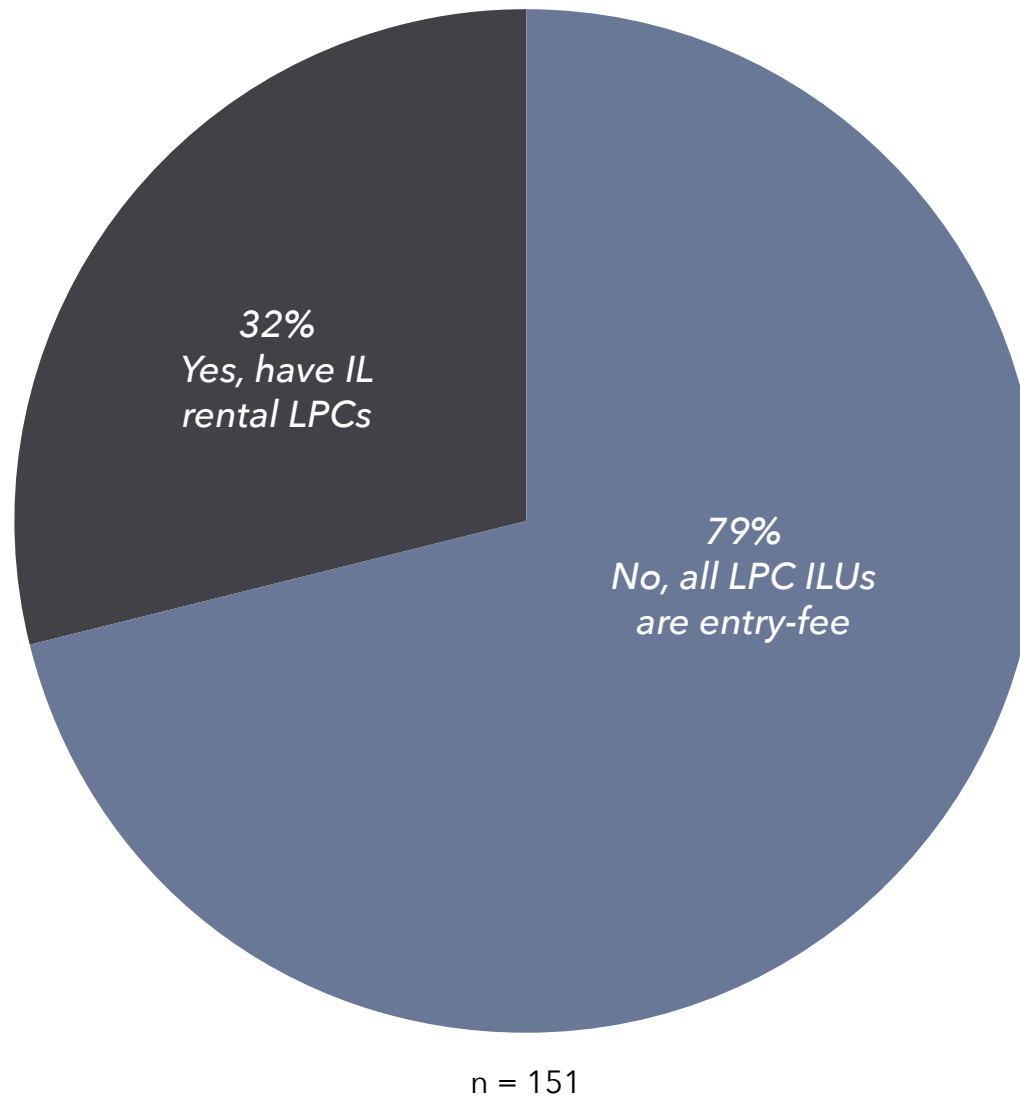
Staffing

The LZ 200 analyses include an examination of the number of full-time equivalents (FTEs) each organization employs. An average of 882 FTEs were employed per organization throughout 2020. Note that the number of FTEs decreased in the 2019 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 2020 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=124	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
2020** avg FTE/unit n=144	882	0.54

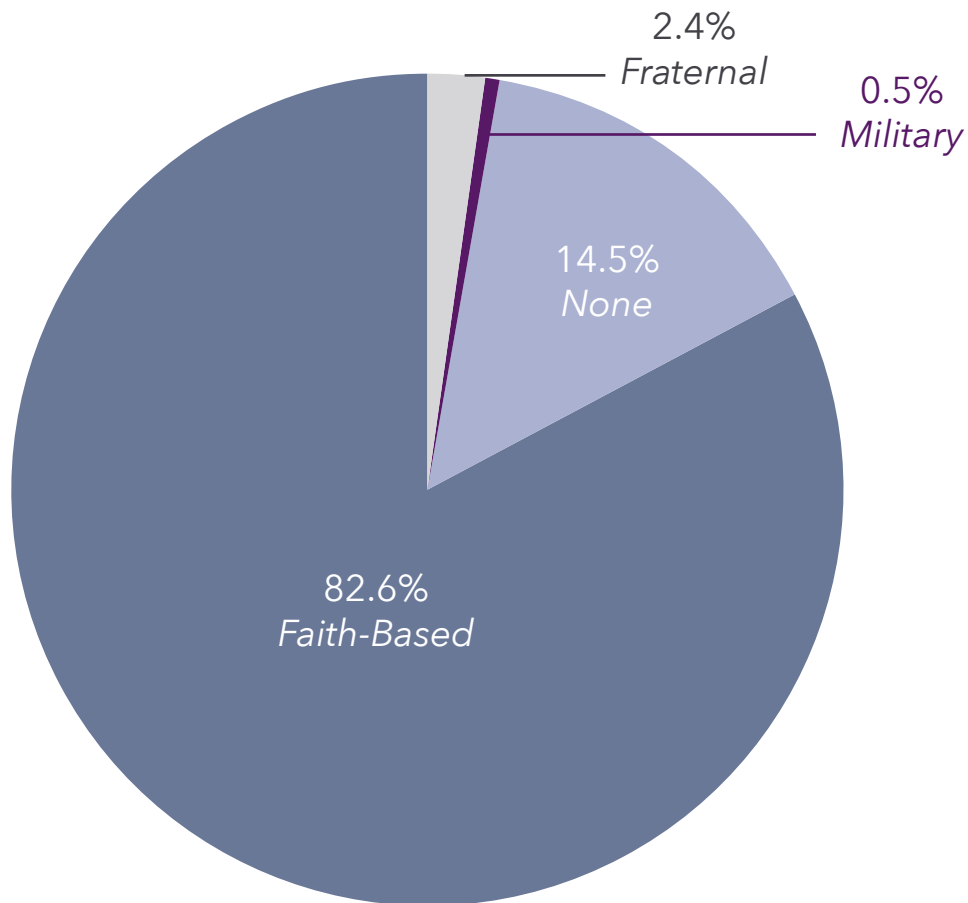
*Reflects change to LZ 150 with the 2014 report **Reflects change to LZ 200 with the 2018 report

Organizational Characteristics: Rental LPCs *Organizations with LPC Rental IL Option*



Analysis of the Data: Affiliations

Affiliation by Total Number of Systems

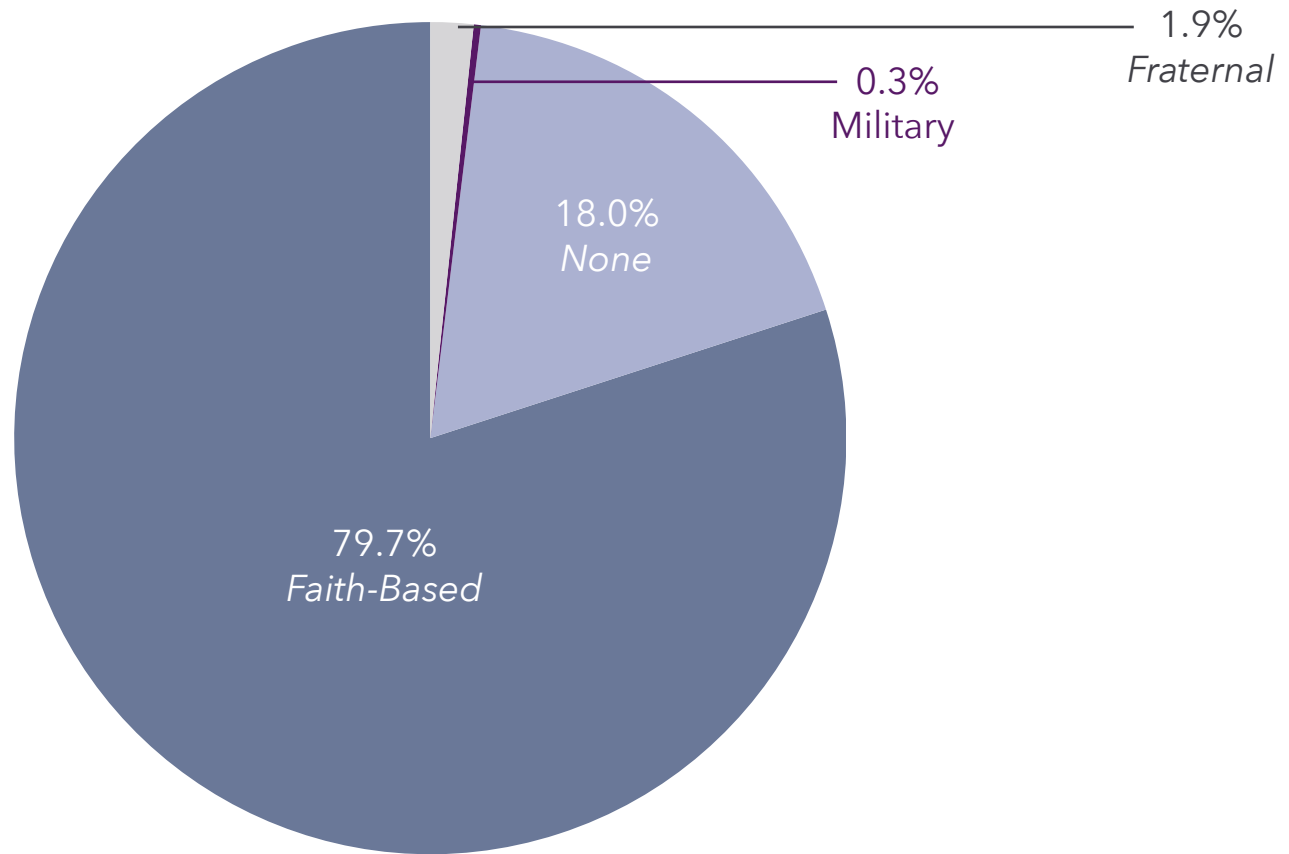


Affiliation

Nearly eighty-three percent (83%) 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 more than 50,000 units. Presbyterian affiliation follows with nearly 40,000 units.

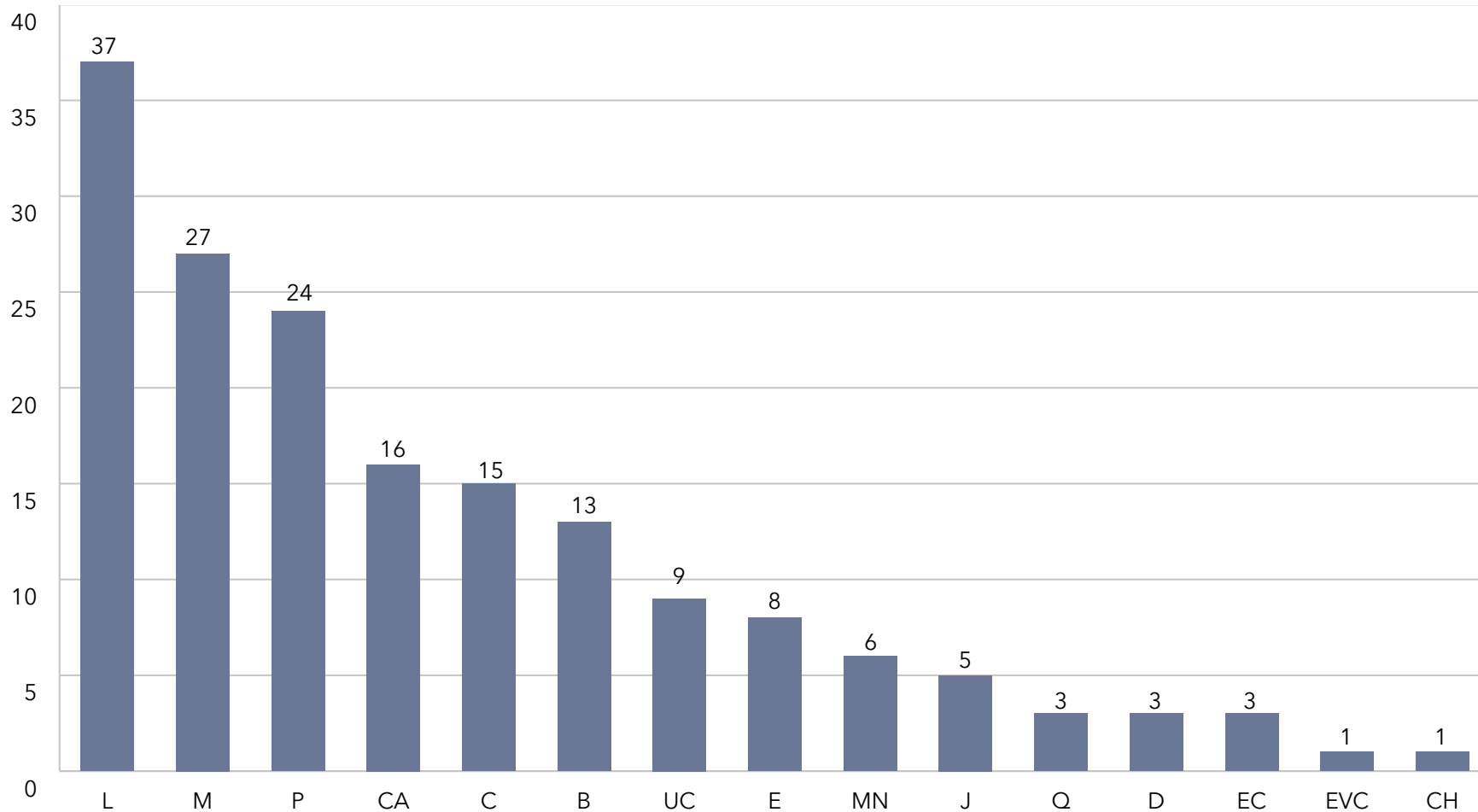
Analysis of the Data: Affiliations

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

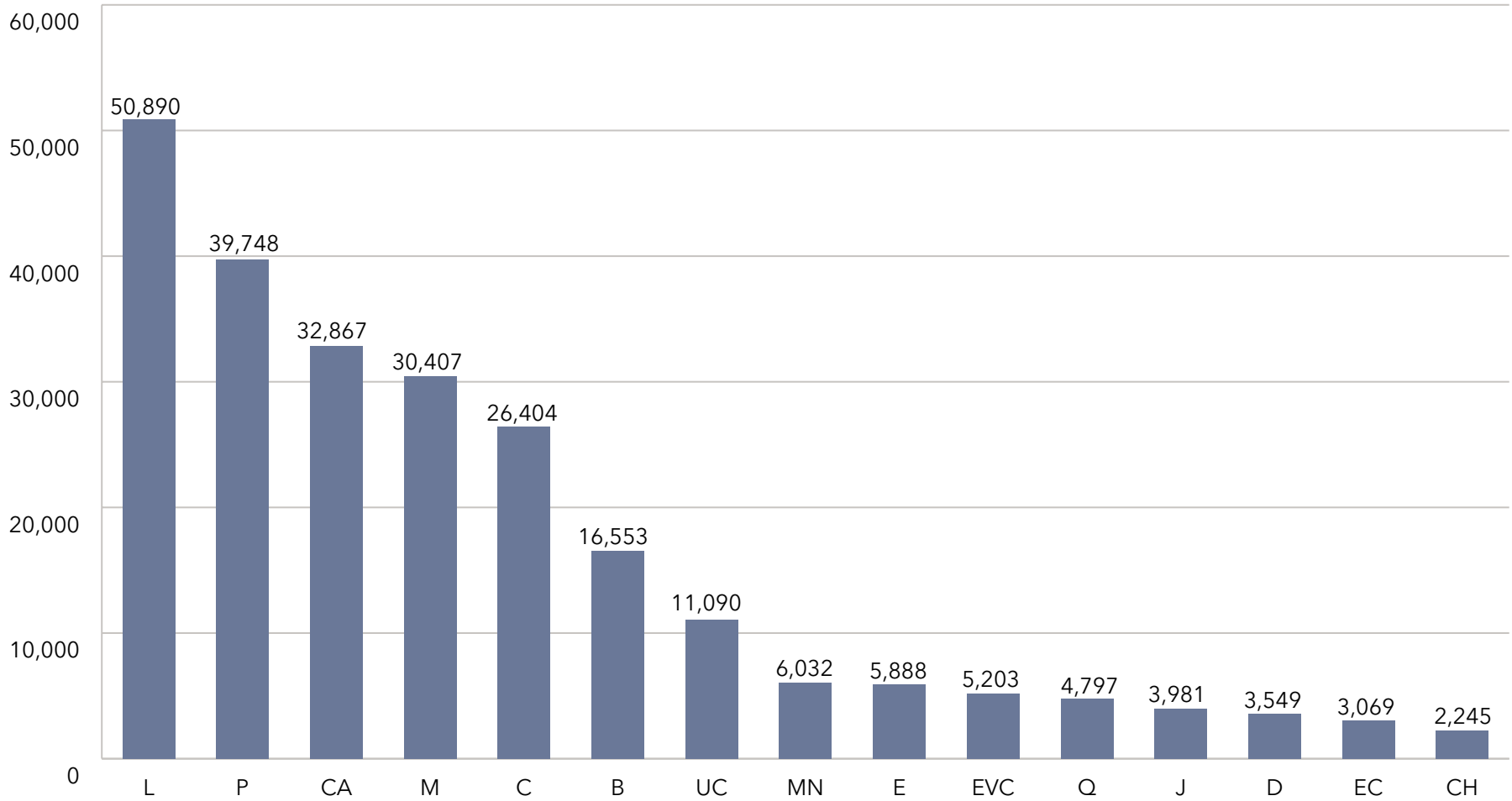
CH Christian and Missionary Alliance
D Dutch Reformed
E Episcopal
EC Ecumenical
EVC Evangelical Covenant

J Jewish
L Lutheran
M Methodist
MN Mennonite
P Presbyterian

Q Quaker
UC United Church of Christ

Analysis of the Data: Affiliations

Faith-Based Affiliations, by Total Units



KEY:

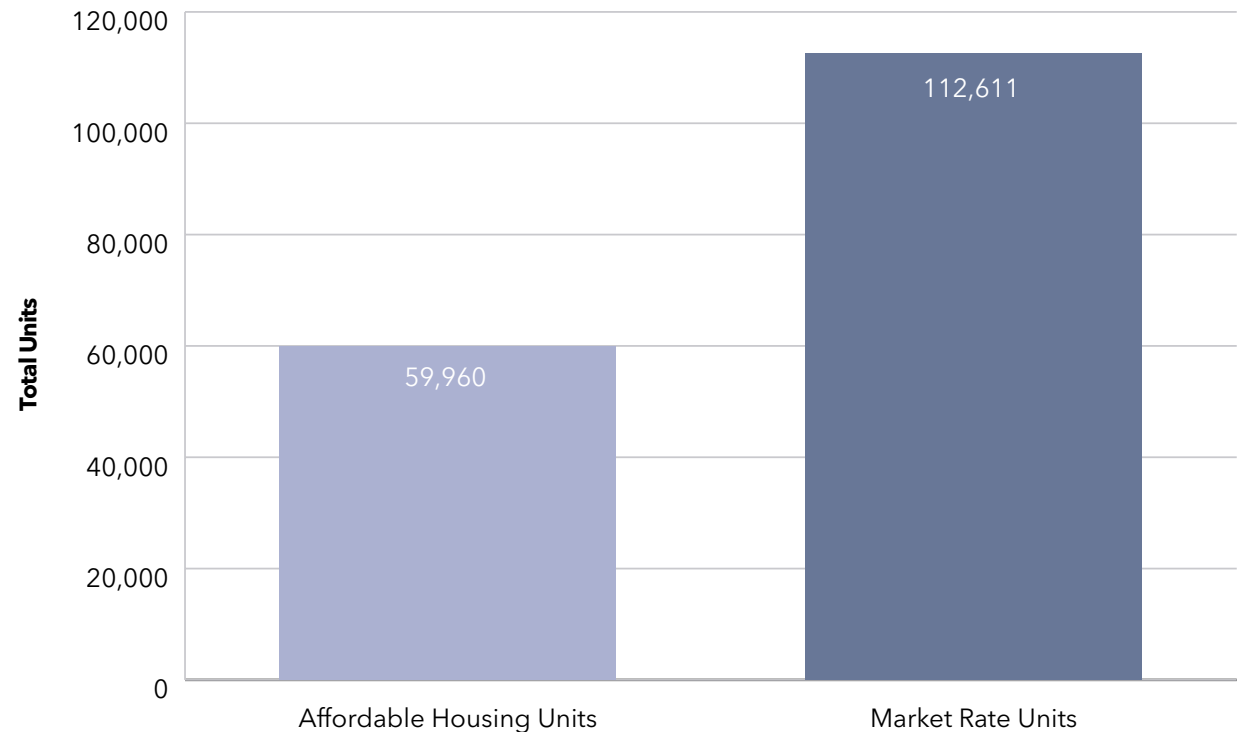
Religions	CH	Christian and Missionary Alliance	J	Jewish	Q	Quaker	
B	Baptist	D	Dutch Reformed	L	Lutheran	UC	United Church of Christ
C	Christian	E	Episcopal	M	Methodist		
CA	Catholic	EC	Ecumenical	MN	Mennonite		
		EVC	Evangelical Covenant	P	Presbyterian		

Organizational Characteristics: Affordable Housing

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

Affordable Housing

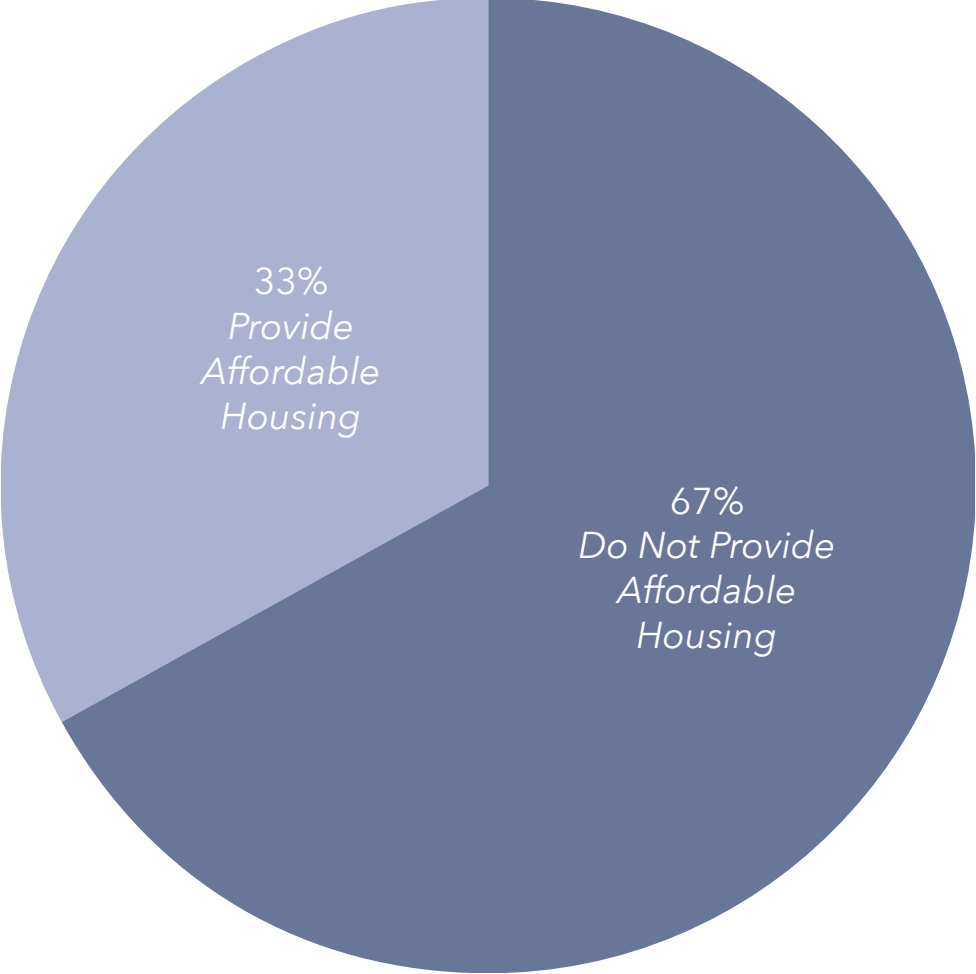
The ranking of the LZ 200 organizations by the number of affordable (non-market-rate & market rate) units is included with this research to show that several the LZ 200 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Section 4-15 and Chapter 6.2 detail these listings further. The data reveal that among the LZ 200, thirty-three percent (33%) have affordable housing units.



n = 65

Organizational Characteristics: Affordable Housing

Percentage Providing Affordable Housing



n = 65

Organizational Characteristics: Managed Units & Communities

Providers that Manage, Ranked by Managed-Only Units

LZ 200 Managed Rank	2021 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
1	159	Ebenezer Society	MN	8,721	96
2	39	National Church Residences	OH	3,411	58
3	6	HumanGood	CA	2,053	30
4	45	Eskaton	CA	1,950	30
5	32	Ecumen	MN	1,704	21
6	97	Christian Living Communities	CO	1,699	15
7	22	Front Porch Communities and Services	CA	1,642	24
8	41	United Church Homes, Inc.	OH	1,532	12
9	7	Trinity Health Senior Communities	MI	1,003	22
10	62	Presbyterian Villages of Michigan	MI	928	7
11	68	American Baptist Homes of the Midwest	MN	817	1
12	17	Cassia	MN	793	12
13	48	Presbyterian SeniorCare Network	PA	729	12
14	18	Pacific Retirement Services	OR	712	2
15	21	The Carmelite System, Inc.	NY	648	2
16	84	The Presbyterian Homes, Inc.	NC	559	1
17	58	Masonicare	CT	512	8
18	24	Masonic Villages	PA	463	1
19	104	St. Andrew's Resources for Seniors System	MO	361	2
20	42	Franciscan Communities	IL	318	2
21	160	Episcopal Communities & Services	CA	311	7
22	51	Baptist Village Communities	OK	280	1
23	71	Western Home Services Inc.	IA	276	9
24	14	Lutheran Senior Services	MO	273	5
25	4	Presbyterian Homes and Services	MN	235	3

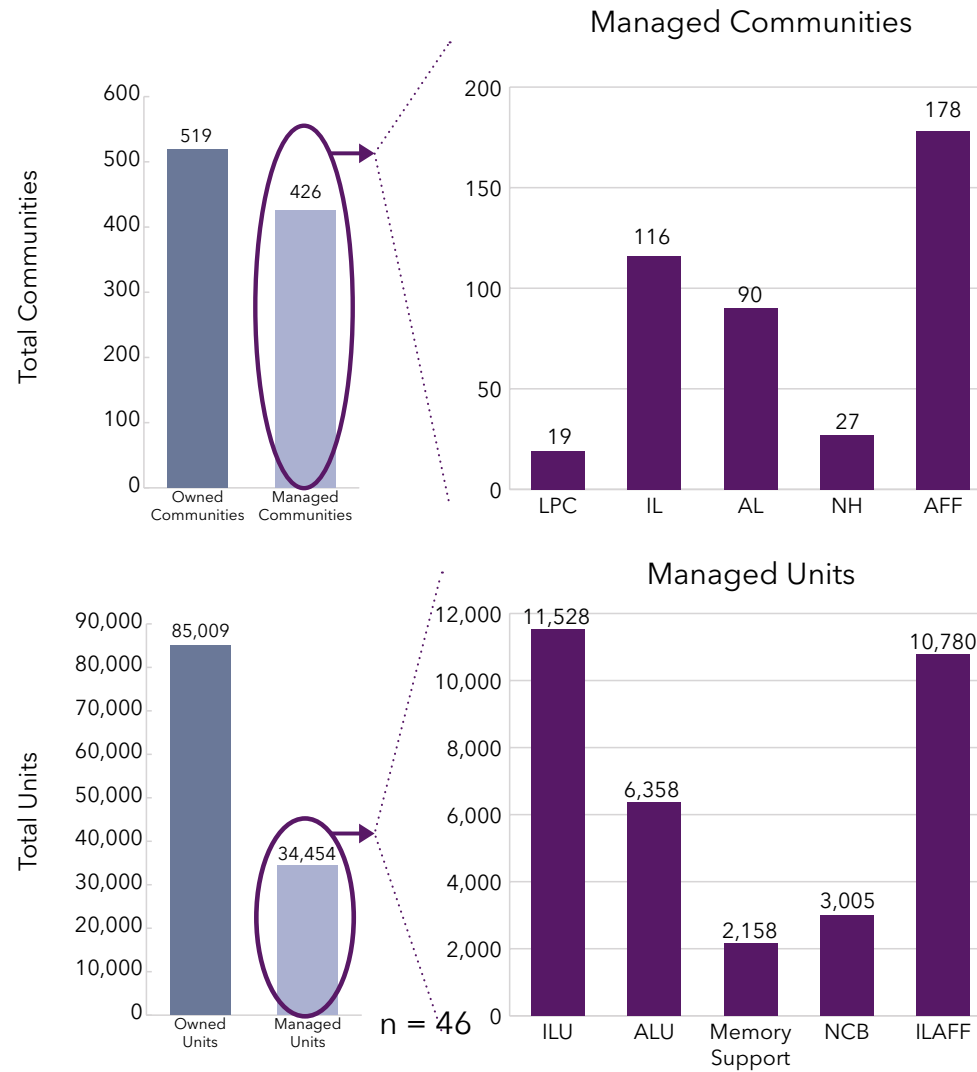
Organizational Characteristics: Managed Units & Communities (Continued)

Providers that Manage, Ranked by Managed-Only Units

LZ 200 Managed Rank	2021 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
26	134	Episcopal SeniorLife Communities	NY	201	5
27	47	BHI Senior Living	IN	199	2
28	127	Samaritas	MI	189	6
29	50	Bethesda Health Group, Inc.	MO	182	2
30	60	Covia Communities	CA	179	2
31	69	UMRC and Porter Hills	MI	178	2
32	176	Lutheran Social Ministries of New Jersey, Inc.	NJ	170	2
33	107	Goodwin House Incorporated	VA	161	1
34	143	St. John's United aka St. John's Lutheran Ministries, Inc.	MT	160	2
35	178	Knute Nelson	MN	143	5
36	175	Bethany St. Joseph Corporation	WI	135	3
37	99	St. Ann's of Greater Rochester, Inc.	NY	108	1
38	145	Baptist Homes Society	PA	100	1
39	57	Lutheran Services Carolinas	NC	72	1
40	156	Episcopal Retirement Services	OH	66	1
41	37	WesleyLife	IA	55	1
42	86	Baruch Senior Ministries	MI	54	2
43	170	Redstone Presbyterian SeniorCare	PA	50	1
44	12	Retirement Housing Foundation	CA	50	1
45	25	Springpoint Senior Living Inc.	NJ	40	1
46	93	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

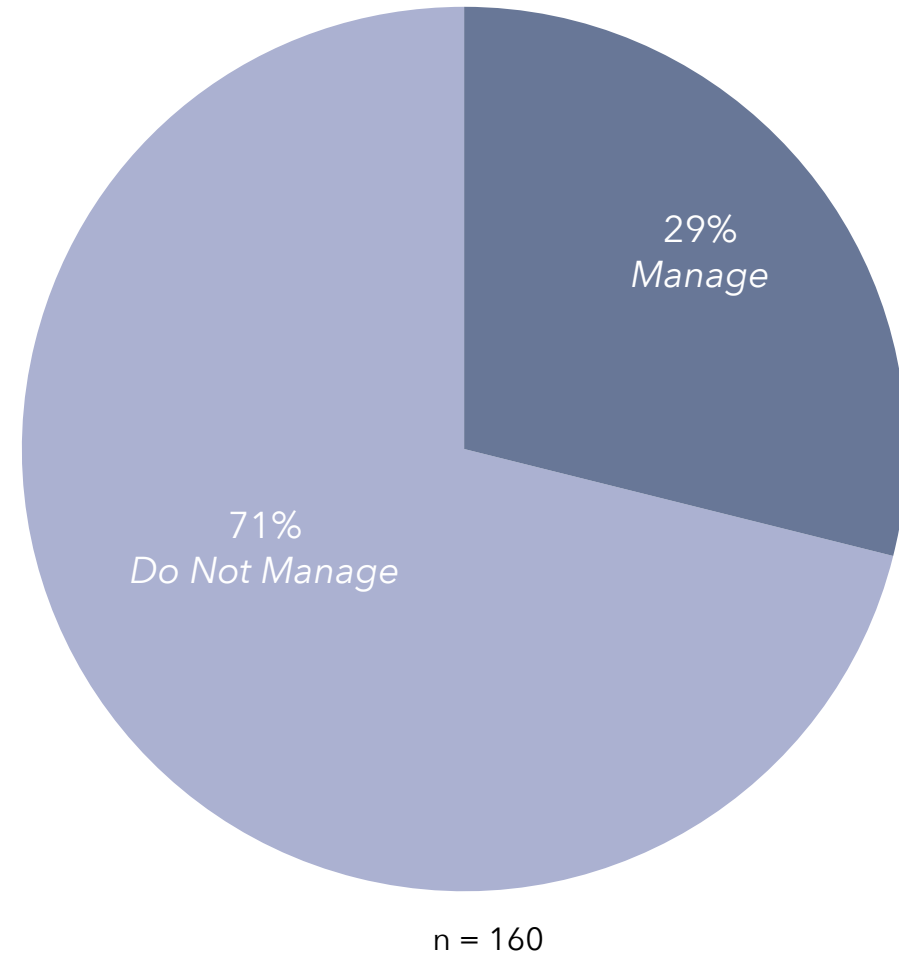


Organizational Characteristics: Managed Units & Communities

Percentage that Manage

Managed Units and Communities

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



Organizational Characteristics: Managed Units & Communities Providers that Manage, Ranked by Market Rate & Managed Units

2021 Combined MR & MGD Rank	2021 LZ 200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	MGD
1	1	National Senior Campuses, Inc.	MA	21,313	18,525	1,635	1,153	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	15,507	4,795	2,110	8,602	0
3	3	ACTS Retirement Services, Inc.	PA	9,563	6,728	1,133	1,702	0
4	159	Ebenezer Society	MN	9,288	0	320	247	8,721
5	4	Presbyterian Homes and Services	MN	8,814	4,555	2,524	1,500	235
6	5	Ascension Living	MO	8,129	2,124	1,203	4,802	0
7	6	HumanGood	CA	7,556	3,371	1,095	1,037	2,053
8	7	Trinity Health Senior Communities	MI	6,499	1,839	1,199	2,458	1,003
9	8	Lifespace Communities, Inc.	IA	5,234	3,652	599	983	0
10	9	Covenant Living Communities & Services	IL	5,203	3,357	870	976	0
11	39	National Church Residences	OH	5,179	1,022	521	225	3,411
12	10	Benedictine	MN	4,616	879	1,577	2,160	0
13	22	Front Porch Communities and Services	CA	4,502	2,159	183	518	1,642
14	15	Cassia	MN	4,463	522	1,512	1,636	793
15	12	Retirement Housing Foundation	CA	4,189	2,642	886	611	50
16	11	Westminster Communities of Florida	FL	4,150	2,841	528	781	0
17	18	Pacific Retirement Services	OR	4,076	2,561	398	405	712
18	14	Lutheran Senior Services	MO	3,964	1,826	763	1,102	273
19	32	Ecumen	MN	3,813	376	1,391	342	1,704
20	13	The Kendal Corporation	PA	3,693	2,450	736	507	0
21	45	Eskaton	CA	3,609	393	780	486	1,950
22	16	Asbury Communities, Inc.	MD	3,579	2,148	522	909	0
23	21	The Carmelite System, Inc.	NY	3,546	51	498	2,349	648
24	17	Presbyterian Senior Living	PA	3,486	1,818	547	1,121	0
25	41	United Church Homes, Inc.	OH	3,247	701	269	745	1,532

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

2021 Combined MR & MGD Rank	2021 LZ 200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	MGD
26	24	Masonic Villages	PA	3,020	1,614	259	684	463
27	19	Ohio Living	OH	2,952	1,632	453	867	0
28	20	Otterbein SeniorLife	OH	2,921	1,215	635	1,071	0
29	23	Concordia Lutheran Ministries	PA	2,796	996	1,137	663	0
30	97	Christian Living Communities	CO	2,629	427	311	192	1,699
31	25	Springpoint Senior Living Inc.	NJ	2,574	1,735	308	491	40
32	26	Volunteers of America	VA	2,484	604	873	1,007	0
33	27	Transforming Age	WA	2,427	1,677	672	78	0
34	48	Presbyterian SeniorCare Network	PA	2,320	396	520	675	729
35	28	Shell Point Retirement Community	FL	2,245	1,447	449	349	0
36	62	Presbyterian Villages of Michigan	MI	2,198	904	264	102	928
37	29	Christian Horizons	MO	2,181	383	312	1,486	0
38	30	Presbyterian Manors of Mid-America, Inc.	KS	2,180	893	537	750	0
39	31	Christian Care Companies	AZ	2,168	1,687	413	68	0
40	33	Diakon Lutheran Social Ministries	PA	2,072	763	414	895	0
41	34	Willow Valley Communities	PA	2,068	1,570	198	300	0
42	68	American Baptist Homes of the Midwest	MN	2,037	359	272	589	817
43	42	Franciscan Communities	IL	2,020	744	345	613	318
44	35	Homewood Retirement Centers, Inc.	MD	1,888	1,149	288	451	0
45	36	Greencroft Communities	IN	1,864	654	586	624	0
46	37	WesleyLife	IA	1,843	764	366	658	55
47	58	Masonicare	CT	1,838	651	309	366	512
48	47	BHI Senior Living, Inc.	IN	1,821	497	773	352	199
49	51	Baptist Village Communities	OK	1,801	939	257	325	1
50	38	ArchCare	NY	1,782	0	59	1,723	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

2021 Combined MR & MGD Rank	2021 LZ 200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	MGD
51	40	Bethesda Senior Living Communities	CO	1,738	111	1,627	0	0
52	50	Bethesda Health Group, Inc.	MO	1,705	727	78	718	182
53	43	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	0
54	44	Loretto	NY	1,684	210	551	923	0
55	46	Covenant Health	MA	1,636	0	364	1,272	0
56	84	The Presbyterian Homes, Inc.	NC	1,587	706	133	189	559
57	49	Hebrew SeniorLife	MA	1,584	655	115	814	0
58	60	Covia Communities	CA	1,489	953	102	255	179
59	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	0
60	71	Western Home Services Inc.	IA	1,469	596	314	283	276
61	53	Mississippi Methodist Senior Services, Inc.	MS	1,423	753	350	320	0
62	54	Providence Life Services	IL	1,421	767	372	282	0
63	55	Presbyterian Homes	IL	1,411	833	237	341	0
64	56	Lutheran Life Communities	IL	1,402	408	310	684	0
65	69	UMRC and Porter Hills	MI	1,377	678	335	186	178
66	57	Lutheran Services Carolinas	NC	1,368	341	295	732	0
67	59	Methodist Retirement Communities	TX	1,316	629	393	294	0
68	61	SantaFe Senior Living Inc.	FL	1,306	876	316	114	0
69	64	Heritage Ministries	NY	1,268	363	221	684	0
70	63	LifeSpire of Virginia	VA	1,268	756	285	227	0
71	65	National Lutheran Communities and Services	MD	1,251	697	245	309	0
72	66	Immanuel	NE	1,240	646	393	201	0
73	104	St. Andrew's Resources for Seniors System	MO	1,238	379	208	290	361
74	67	Wesley Enhanced Living	PA	1,235	646	229	360	0
75	70	Holland Home	MI	1,198	751	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

2021 Combined MR & MGD Rank	2021 LZ 200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	MGD
76	72	SpiriTrust Lutheran	PA	1,182	549	289	344	0
77	73	Friendship Villages of St. Louis	MO	1,175	811	130	234	0
78	74	Phoebe Ministries	PA	1,163	370	259	534	0
79	75	Eventide	MN	1,156	71	533	552	0
80	76	United Methodist Homes	NY	1,134	437	271	426	0
81	77	Pinnacle Living	VA	1,127	544	393	190	0
82	78	Friendship Senior Options	IL	1,115	689	184	242	0
83	79	Ingleside	MD	1,112	832	157	123	0
84	80	Lutheran SeniorLife	PA	1,083	492	192	399	0
85	81	Walker Methodist	MN	1,075	0	748	327	0
86	82	Life Enriching Communities	OH	1,067	613	178	276	0
87	83	Lutheran Homes of South Carolina	SC	1,064	407	306	351	0
88	86	Baruch Senior Ministries	MI	1,056	0	1,002	0	54
89	99	St. Ann's of Greater Rochester, Inc.	NY	1,021	296	75	542	108
90	85	Christian Care Communities	KY	1,016	432	179	405	0
91	107	Goodwin House Incorporated	VA	1,011	580	121	149	161
92	87	Felician Services, Inc.	IL	990	177	268	545	0
93	93	United Church Homes and Services	NC	985	535	90	328	32
94	88	Blue Skies of Texas	TX	984	728	129	127	0
95	89	Presbyterian Communities of South Carolina	SC	983	411	298	274	0
96	90	Liberty Lutheran Services	PA	978	443	318	217	0
97	91	The United Methodist Retirement Homes, Inc.	NC	975	659	114	202	0
98	92	Saint Therese	MN	965	467	133	365	0
99	127	Samaritas	MI	950	293	120	348	189
100	94	Sequoia Living	CA	946	702	103	141	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

2021 Combined MR & MGD Rank	2021 LZ 200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	MGD
101	95	The RiverWoods Group	NH	940	681	172	87	0
102	96	Wesley	WA	930	592	154	184	0
103	134	Episcopal SeniorLife Communities	NY	917	334	200	182	201
104	98	St. John's	NY	916	403	38	475	0
105	100	Givens Communities	NC	900	681	89	130	0
106	101	Haverland Carter Lifestyle Group	NM	890	410	373	107	0
107	102	Masonic Homes Kentucky	KY	888	450	151	287	0
108	103	United Methodist Communities	NJ	884	88	548	248	0
109	160	Episcopal Communities & Services	CA	877	436	82	48	311
110	105	Menno Haven, Inc.	PA	868	506	202	160	0
111	106	Sun Health Services	AZ	867	637	115	115	0
112	108	Mather	IL	848	712	59	77	0
113	109	Garden Spot Communities	PA	845	621	105	119	0
114	110	Living Branches	PA	839	459	237	143	0
115	111	The New Jewish Home	NY	838	24	0	814	0
116	143	St. John's United	MT	825	195	284	186	160
117	112	Lutheran Social Ministries of Maryland	MD	822	637	70	115	0
118	113	Presbyterian Homes of Georgia	GA	814	330	149	335	0
119	114	LutherCare	PA	810	473	126	211	0
120	115	Landis Communities	PA	808	545	160	103	0
121	116	Messiah Lifeways	PA	808	441	183	184	0
122	117	Methodist Homes of Alabama & Northwest Florida	AL	803	39	339	425	0
123	119	Simpson Senior Services	PA	802	454	170	178	0
124	118	Wesley Willows	IL	802	546	165	91	0
125	120	Oakwood Lutheran Senior Ministries	WI	789	492	197	100	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

2021 Combined MR & MGD Rank	2021 LZ 200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	MGD
126	121	Sunnyside Communities	VA	783	494	155	134	0
127	122	Vista Prairie Communities	MN	783	100	683	0	0
128	123	The Moorings, Incorporated	FL	777	557	114	106	0
129	124	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	0
130	125	Grace Inspired Ministries	PA	767	451	151	165	0
131	126	United Church of Christ Homes	PA	766	267	124	375	0
132	128	Christian Care Centers, Inc.	TX	759	411	229	119	0
133	145	Baptist Homes Society	PA	753	326	138	189	100
134	130	Benevolent Corporation Cedar Community	WI	747	412	225	110	0
135	129	Brazos Presbyterian Homes	TX	747	425	121	201	0
136	131	The Ohio Masonic Home	OH	732	302	266	164	0
137	132	Bethany Lutheran Homes, Inc.	WI	726	282	321	123	0
138	133	Emerald Communities	WA	725	527	107	91	0
139	136	Christian Health fka Christian Health Care Center	NJ	707	329	80	298	0
140	135	Morningside Ministries	TX	707	345	152	210	0
141	137	United Methodist Memorial Home	IN	699	188	255	256	0
142	138	LifeStream Complete Senior Living, Inc.	AZ	694	369	158	167	0
143	139	Sunset Senior Communities	MI	681	304	263	114	0
144	140	The Wesley Communities	OH	678	338	234	106	0
145	141	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	0
146	142	Vincentian Collaborative Services	PA	675	66	82	527	0
147	176	Lutheran Social Ministries of New Jersey, Inc.	NJ	663	270	114	109	170
148	144	Elder Care Alliance	CA	658	135	464	59	0
149	146	Maple Knoll Communities, Inc.	OH	649	400	91	158	0
150	156	Episcopal Retirement Services	OH	642	267	115	194	66

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

2021 Combined MR & MGD Rank	2021 LZ 200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	MGD
151	147	Community Wellness Partners, Inc.	NY	640	124	0	516	0
152	148	Smith Senior Living	IL	636	322	144	170	0
153	149	Wellspring Lutheran Services	MI	635	125	169	341	0
154	175	Bethany St. Joseph Corporation	WI	632	135	158	204	135
155	150	CRISTA Senior Living	WA	624	374	141	109	0
156	151	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	0
157	178	Knute Nelson	MN	617	211	180	83	143
158	152	Baptist Retirement Homes of North Carolina, Inc.	NC	597	262	134	201	0
159	153	Genacross Lutheran Services	OH	597	137	175	285	0
160	154	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	0
161	155	Lutheran Life Villages	IN	577	183	69	325	0
162	170	Redstone Presbyterian SeniorCare	PA	571	310	134	77	50
163	157	Friends Homes, Inc.	NC	568	359	100	109	0
164	158	Havenwood Heritage Heights	NH	567	367	63	137	0
165	161	Bethel	NY	563	170	130	263	0
166	162	Christian Village Communities	OH	559	221	190	148	0
167	163	Friendly Senior Living	NY	555	298	57	200	0
168	164	Sholom Community Alliance	MN	552	153	142	257	0
169	165	Church Homes, Inc.	CT	542	319	24	199	0
170	166	Cardinal Ritter Senior Services	MO	541	205	90	246	0
171	167	Medford Leas	NJ	536	393	119	24	0
172	168	EHM Senior Solutions	MI	529	112	70	347	0
173	169	The Lutheran Home Association	WI	525	161	157	207	0
174	171	LindenGrove Communities	WI	511	0	258	253	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

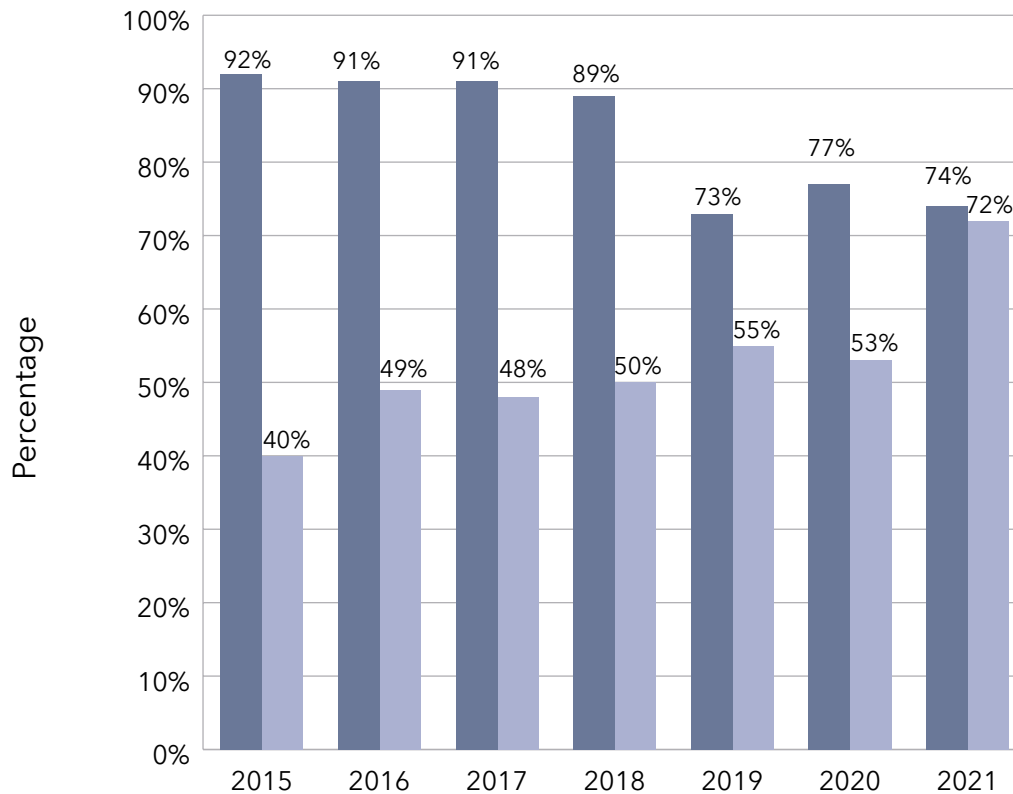
Organizational Characteristics: Managed Units & Communities (Continued)

Providers that Manage, Ranked by Market Rate & Managed Units

2021 Combined MR & MGD Rank	2021 LZ 200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	MGD
176	173	Rockwood Retirement Communities	WA	505	346	94	65	0
177	174	Judson Services, Inc.	OH	500	227	135	138	0
178	177	The Eliza Jennings Senior Care Network	OH	486	175	89	222	0
179	179	Deaconess Abundant Life Communities	MA	469	283	144	42	0
180	180	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	0
181	181	Allegheny Lutheran Social Ministries Inc.	PA	463	215	96	152	0
182	182	The Lutheran Home and Harwood Place	WI	461	170	104	187	0
183	183	Tabitha	NE	460	0	149	311	0
184	184	The Loomis Communities	MA	459	359	58	42	0
185	185	Good Shepherd Communities, Inc.	NY	457	192	99	166	0
186	186	St. Paul's Senior Services	CA	451	188	204	59	0
187	187	Michigan Masonic Homes	MI	442	38	155	249	0
188	188	Beechwood Health Care Center, Inc.	NY	438	110	56	272	0
189	189	Willow Brook Christian Communities	OH	437	230	123	84	0
190	190	Baptist Life Communities	KY	428	150	60	218	0
191	191	Skaalen Retirement Services	WI	419	229	99	91	0
192	192	A.G.Rhodes	GA	418	0	0	418	0
193	193	Community First Solutions	OH	409	180	101	128	0
194	194	SCBMA	SC	402	94	134	174	0
195	195	Clark Retirement Community, Inc.	MI	400	195	166	39	0
196	196	Saint Mary's Home of Erie	PA	393	26	148	219	0
197	197	Jewish Senior Life of Metropolitan Detroit	MI	384	290	94	0	0
198	198	Parker	NJ	372	0	60	312	0
199	199	ACC Senior Services	CA	371	146	126	99	0
200	200	Bethesda	MN	366	61	57	248	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



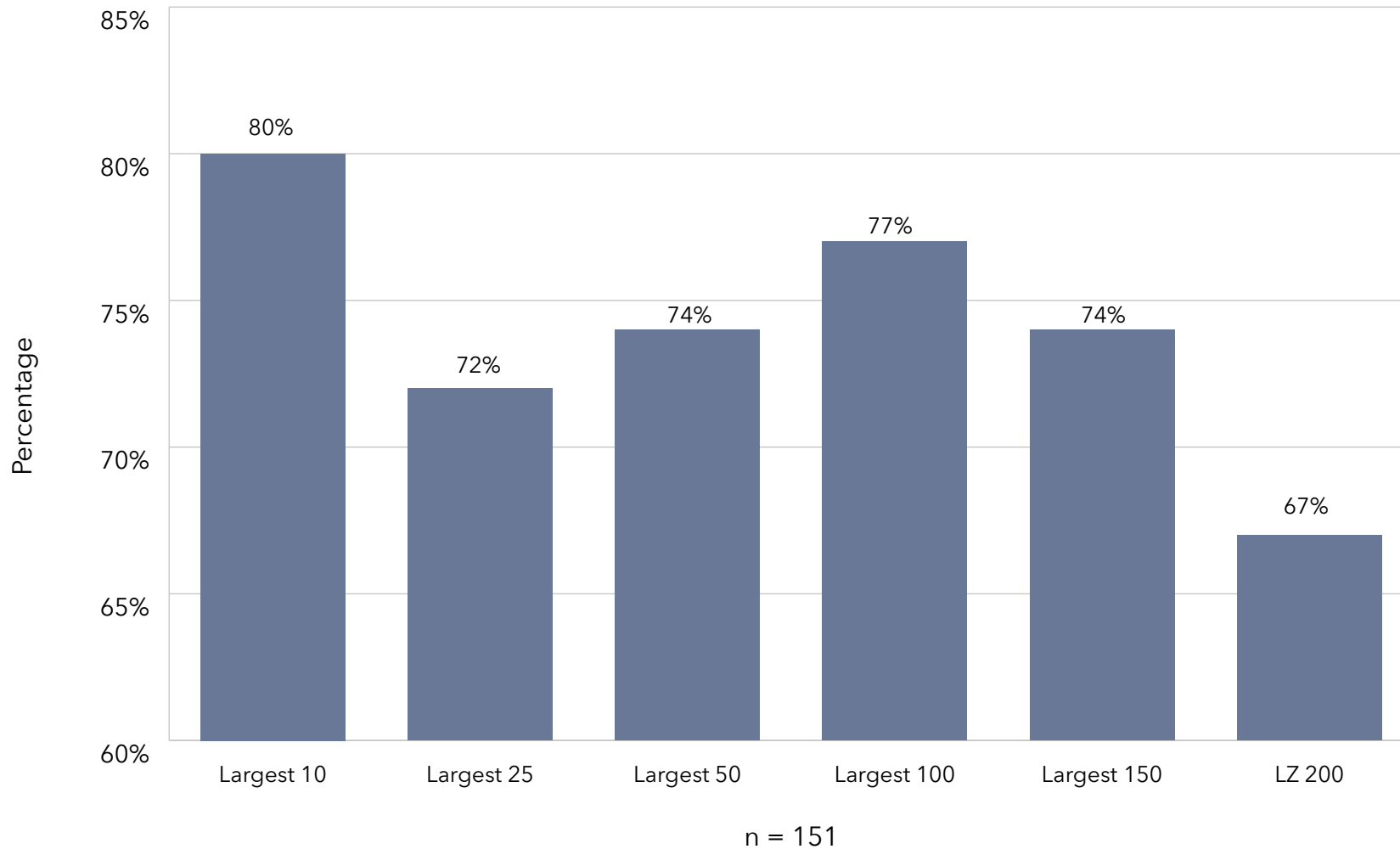
KEY: ■ Percentage Private (AL) ■ Percentage Private (SN)

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 74% being private. On the other hand, 72% 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 67% 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.

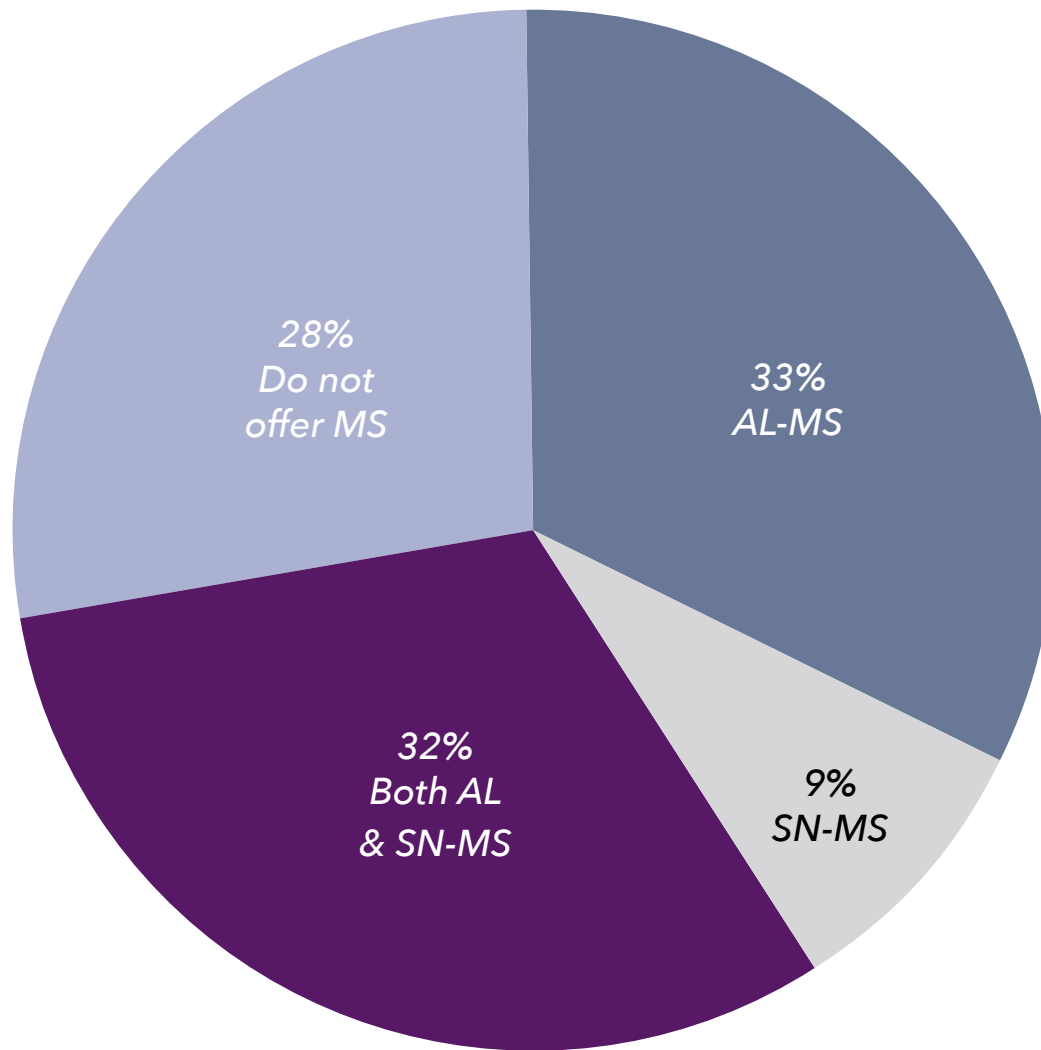
Organizational Characteristics: Assisted and Skilled Composition *Percentage That Offer Memory Support*



KEY: ■ Offer Memory Support

Organizational Characteristics: Assisted and Skilled Composition

Type of Memory Support Offered

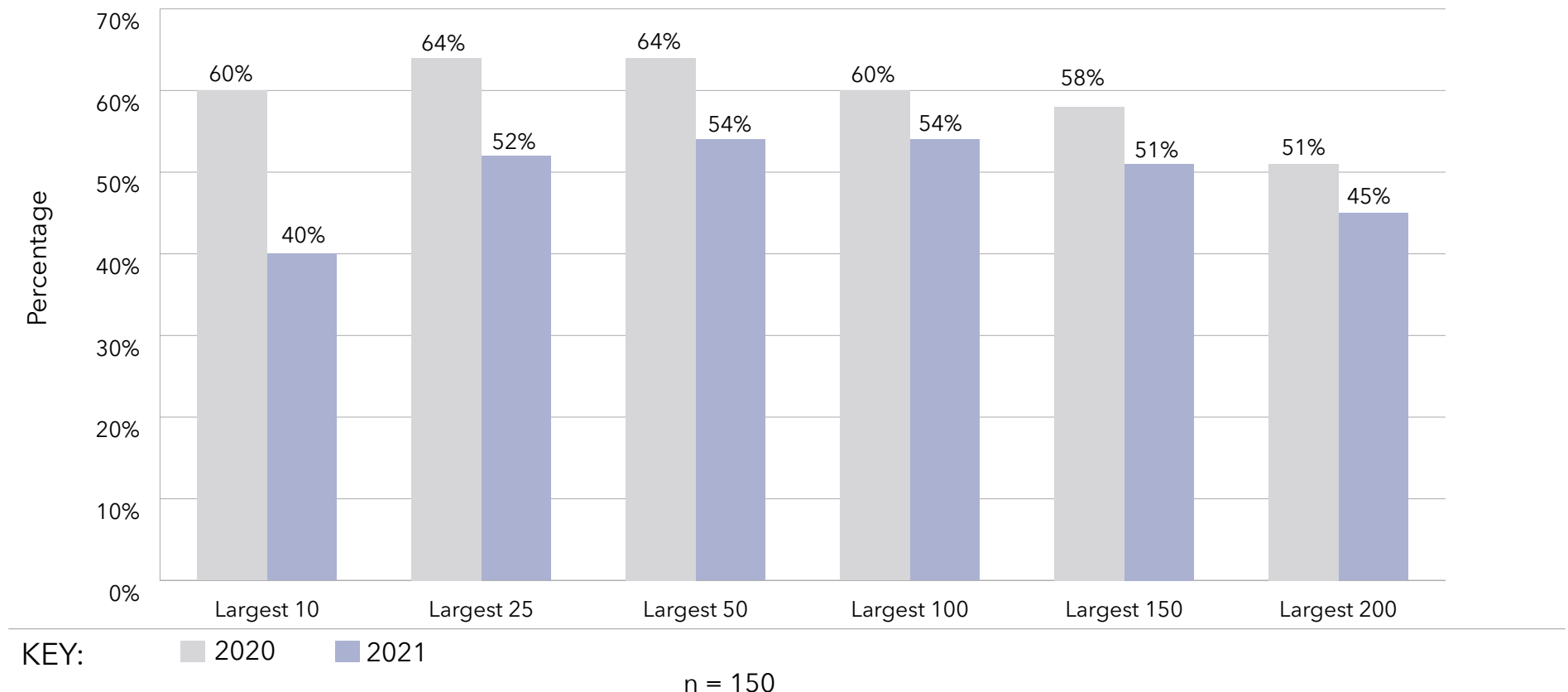


n = 151

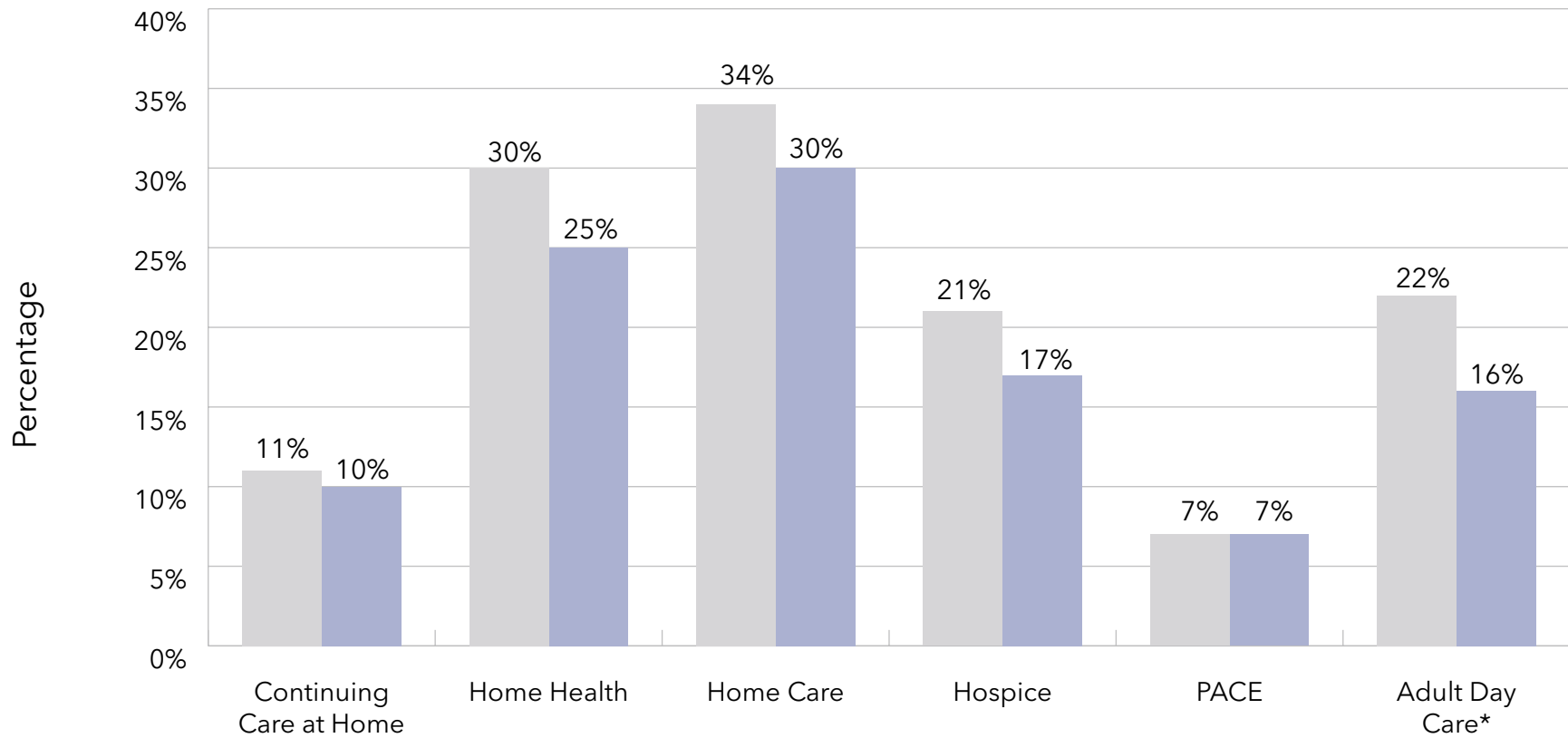
Organizational Characteristics: Home & Community-Based Services Percentage Offering HCBS to Non-Residents

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, 45% 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 10% of the LZ 200. Approximately seven percent (7%) have PACE programs, and hospice services are being provided by 17%..



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



KEY: 2020 2021

n = 150

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

2021 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
1	Trinity Health Senior Communities	MI	>\$50 million
2	Presbyterian Villages of Michigan	MI	>\$50 million
3	Holland Home	MI	>\$50 million
4	St. Paul's Senior Services	CA	>\$50 million
5	UMRC and Porter Hills	MI	>\$50 million
6	Concordia Lutheran Ministries	PA	>\$50 million
7	The New Jewish Home	NY	\$25-\$50 Million
8	Ohio Living	OH	\$25-\$50 Million
9	Masonicare	CT	\$25-\$50 Million
10	Transforming Age	WA	\$25-\$50 Million
11	Presbyterian Homes and Services	MN	\$25-\$50 Million
12	Community First Solutions	OH	\$10-\$24 million
13	United Church Homes and Services	NC	\$10-\$24 million
14	Covenant Living Communities & Services	IL	\$10-\$24 million
15	ACTS Retirement Services, Inc.	PA	\$10-\$24 million
16	Knute Nelson	MN	\$10-\$24 million
17	Lutheran Social Ministries of New Jersey, Inc.	NJ	\$10-\$24 million
18	WesleyLife	IA	\$10-\$24 million
19	Lutheran SeniorLife	PA	\$10-\$24 million
20	Hebrew SeniorLife	MA	\$10-\$24 million
21	Providence Life Services	IL	\$10-\$24 million
22	Lutheran Homes of South Carolina	SC	\$10-\$24 million
23	The Moorings, Incorporated	FL	<\$10 million
24	Presbyterian SeniorCare Network	PA	<\$10 million
25	Wesley	WA	<\$10 million

n = 82

Reflects revenues for those who provided their information.

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

2021 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
26	Springpoint Senior Living Inc.	NJ	<\$10 million
27	Lutheran Senior Services	MO	<\$10 million
28	United Lutheran Program for the Aging, Inc.	WI	<\$10 million
29	Sunnyside Communities	VA	<\$10 million
30	Bethesda Health Group, Inc.	MO	<\$10 million
31	Allegheny Lutheran Social Ministries Inc.	PA	<\$10 million
32	Saint Therese	MN	<\$10 million
33	Redstone Presbyterian SeniorCare	PA	<\$10 million
34	Covenant Health	MA	<\$10 million
35	Deaconess Abundant Life Communities	MA	<\$10 million
36	Lutheran Life Communities	IL	<\$10 million
37	The Kendal Corporation	PA	<\$10 million
38	HumanGood	CA	<\$10 million
39	Asbury Communities, Inc.	MD	<\$10 million
40	Eskaton	CA	<\$10 million
41	Otterbein SeniorLife	OH	<\$10 million
42	Parker	NJ	<\$10 million
43	Baptist Village Communities	OK	<\$10 million
44	Christian Living Communities	CO	<\$10 million
45	Willow Valley Communities	PA	<\$10 million
46	St. John's United aka St. John's Lutheran Ministries, Inc.	MT	<\$10 million
47	BHI Senior Living, Inc.	IN	<\$10 million
48	Benevolent Corporation Cedar Community	WI	<\$10 million
49	National Lutheran Communities and Services	MD	<\$10 million
50	Morningside Ministries	TX	<\$10 million

n = 82

Reflects revenues for those who provided their information.

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

2021 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
51	The United Methodist Retirement Homes, Inc.	NC	<\$10 million
52	Samaritas	MI	<\$10 million
53	Presbyterian Manors of Mid-America, Inc.	KS	<\$10 million
54	Benedictine	MN	<\$10 million
55	United Methodist Communities	NJ	<\$10 million
56	Landis Communities	PA	<\$10 million
57	St. Andrew's Resources for Seniors System	MO	<\$10 million
58	Messiah Lifeways	PA	<\$10 million
59	Ingleside	MD	<\$10 million
60	Presbyterian Senior Living	PA	<\$10 million
61	Lutheran Services Carolinas	NC	<\$10 million
62	Masonic Homes Kentucky	KY	<\$10 million
63	Goodwin House Incorporated	VA	<\$10 million
64	Menno-Haven, Inc.	PA	<\$10 million
65	Genacross Lutheran Services	OH	<\$10 million
66	Liberty Lutheran Services	PA	<\$10 million
67	LifeSpire of Virginia	VA	<\$10 million
68	United Methodist Homes	NY	<\$10 million
69	Christian Care Companies	AZ	<\$10 million
70	Jewish Senior Life of Metropolitan Detroit	MI	<\$10 million
71	Episcopal SeniorLife Communities	NY	<\$10 million
72	Greencroft Communities	IN	<\$10 million
73	Garden Spot Communities	PA	<\$10 million
74	Baptist Homes Society	PA	<\$10 million
75	Christian Care Centers, Inc.	TX	<\$10 million

n = 82

Reflects revenues for those who provided their information.

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

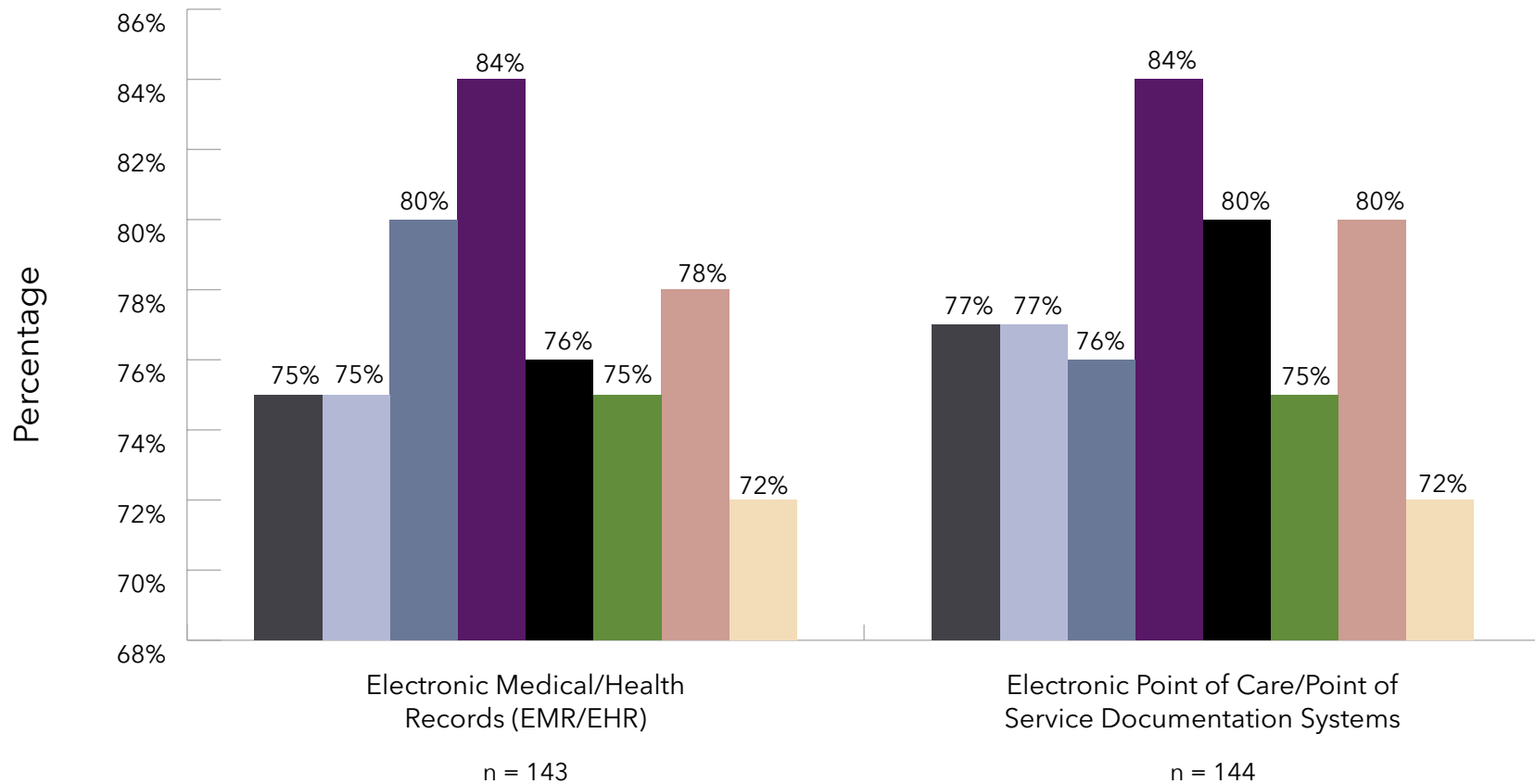
2021 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
76	Bethany St. Joseph Corporation	WI	<\$10 million
77	Haverland Carter Lifestyle Group	NM	<\$10 million
78	Sunset Senior Communities	MI	<\$10 million
79	Christian Care Communities	KY	<\$10 million
80	Buckner Retirement Services, Inc.	TX	<\$10 million
81	Life Enriching Communities	OH	<\$10 million
82	Western Home Services Inc.	IA	<\$10 million

n = 82

Reflects revenues for those who provided their information.

Organizational Characteristics: Technology Adoption

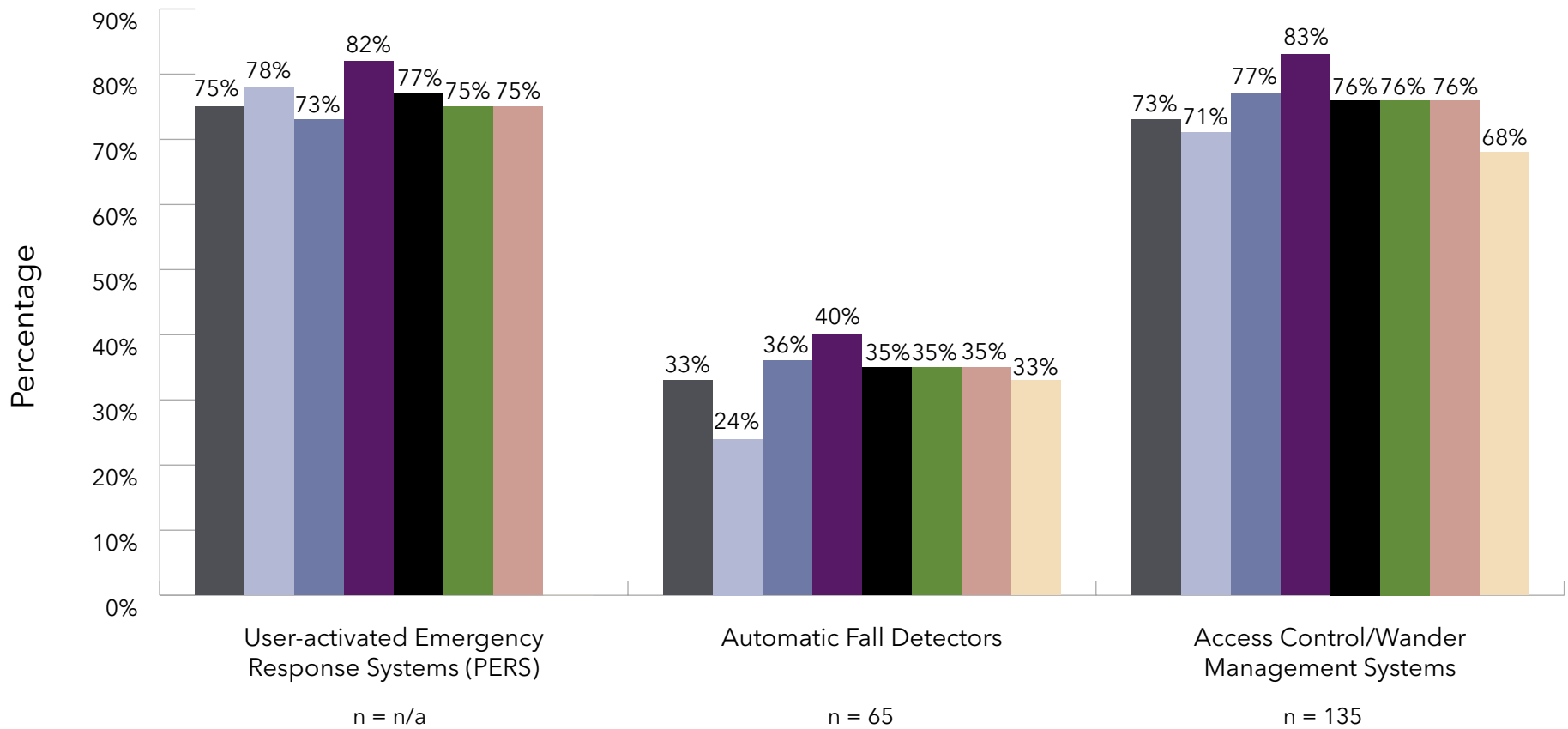
Percentage of Communities/Operations Using Electronic Documentation Technologies



*Reflects LZ 200 increase with 2018 report

Organizational Characteristics: Technology Adoption

Percentage Communities/Operations Using Safety Monitoring Technologies



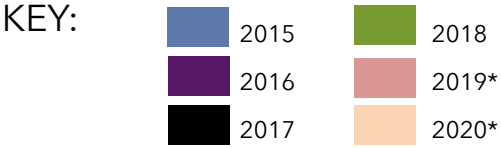
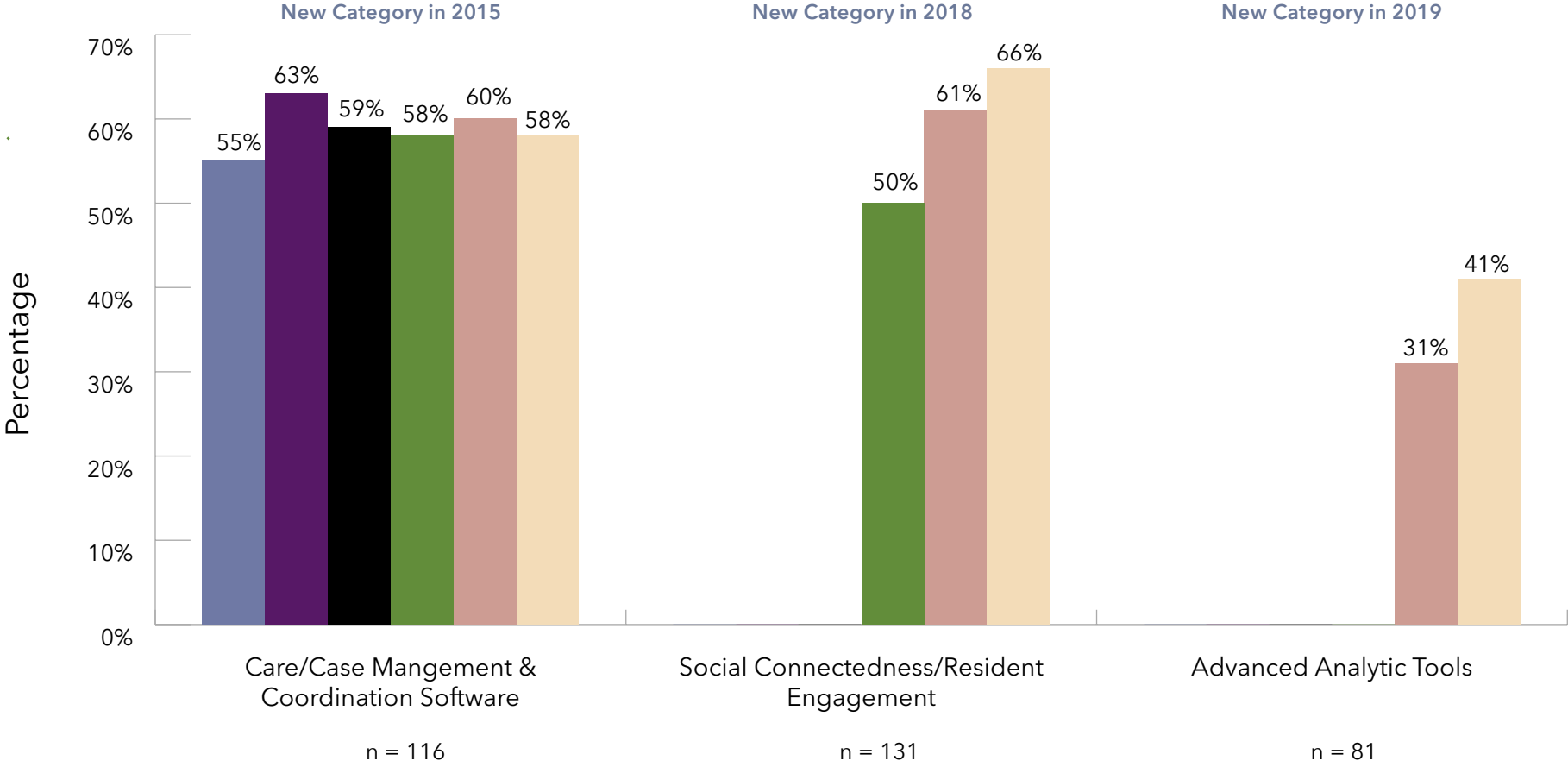
KEY:

2013	2016	2019*
2014	2017*	2020*
2015	2018*	

*Reflects LZ 200 increase with 2018 report

Organizational Characteristics: Technology Adoption

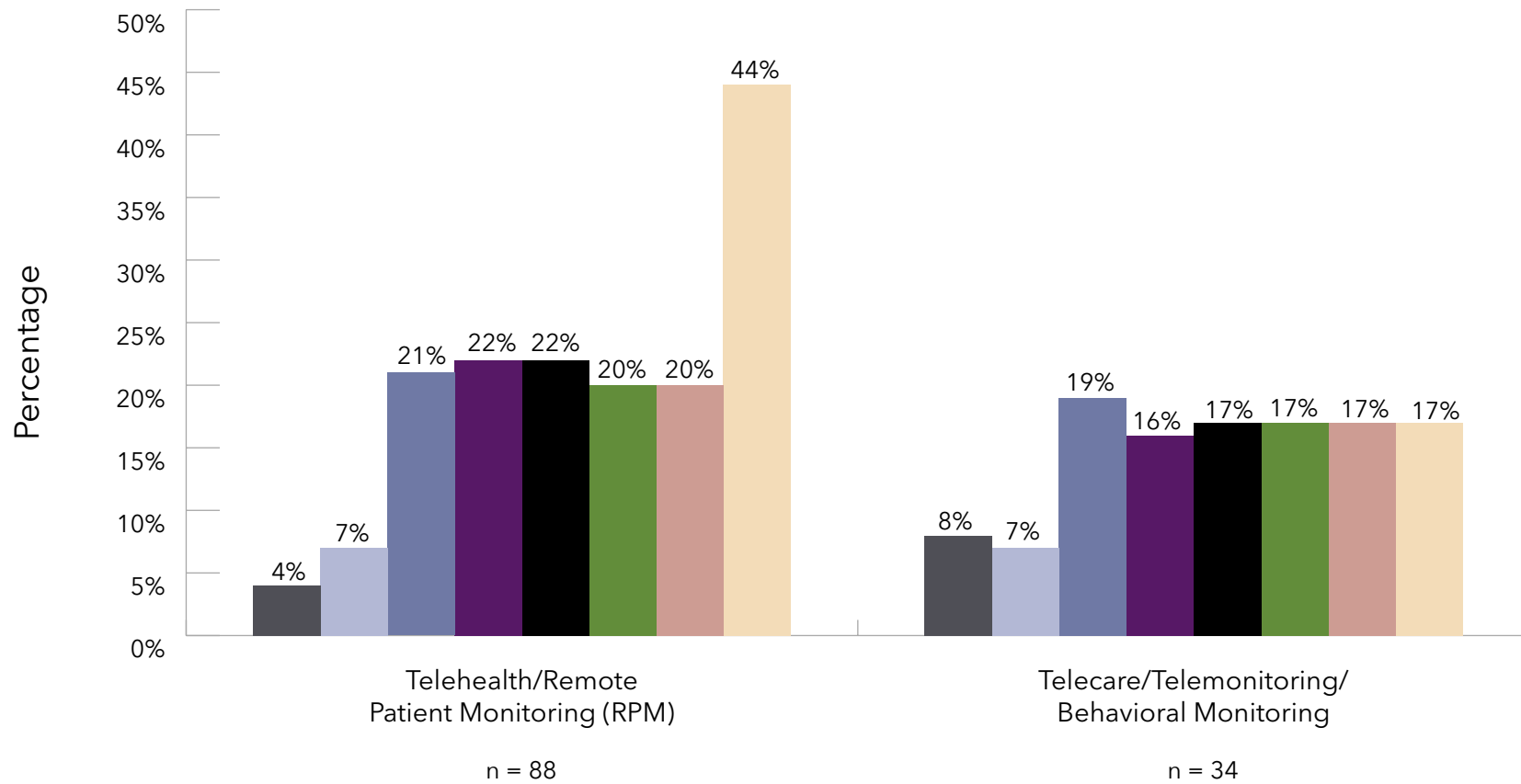
Percentage of Coordination Software & Resident Engagement Technologies



*Reflects LZ 200 increase with 2018 report

Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies



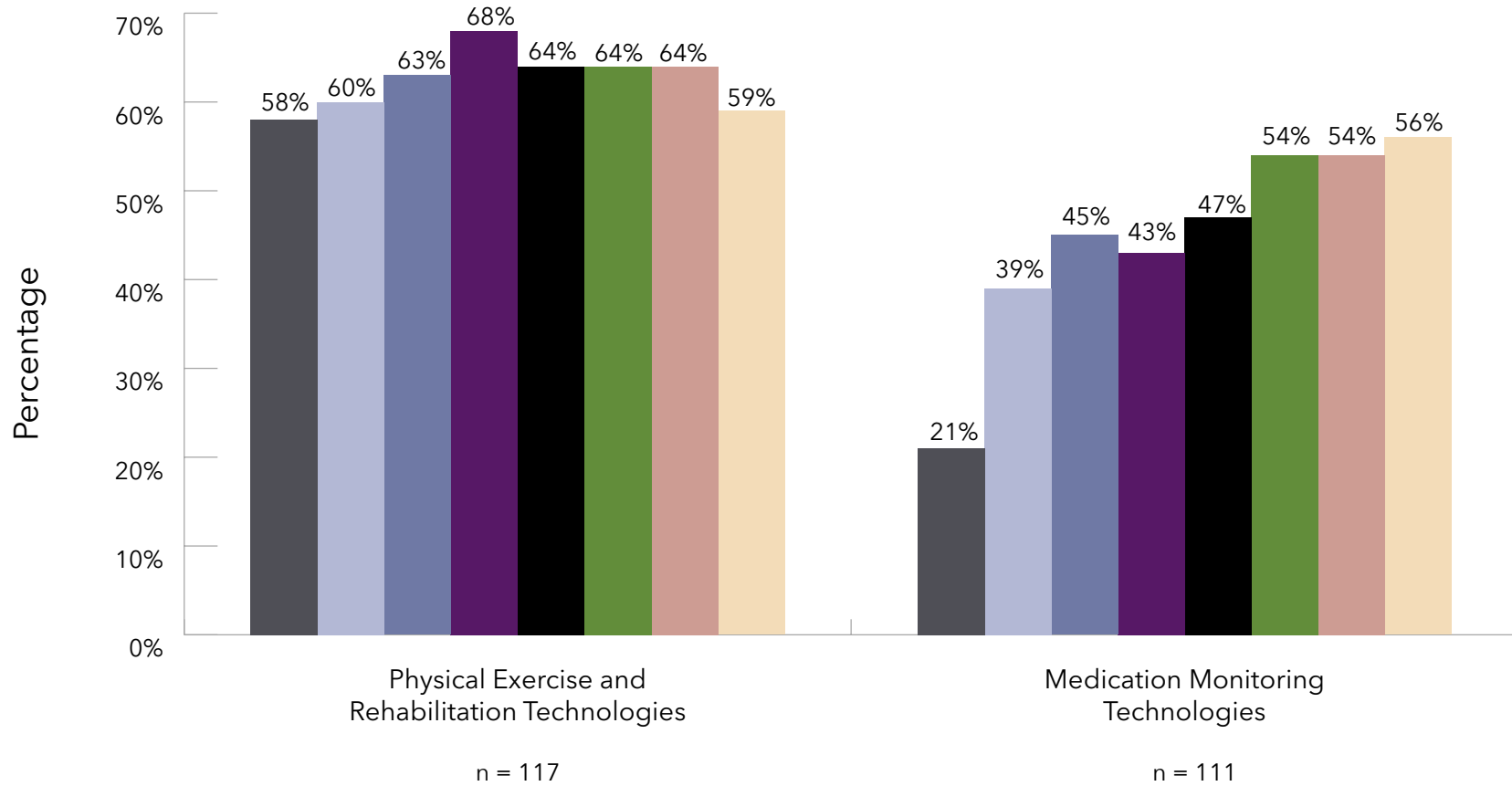
KEY:

 2013	 2016	 2019*
 2014	 2017*	 2020*
 2015	 2018*	

*Reflects LZ 200 increase with 2018 report

Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies



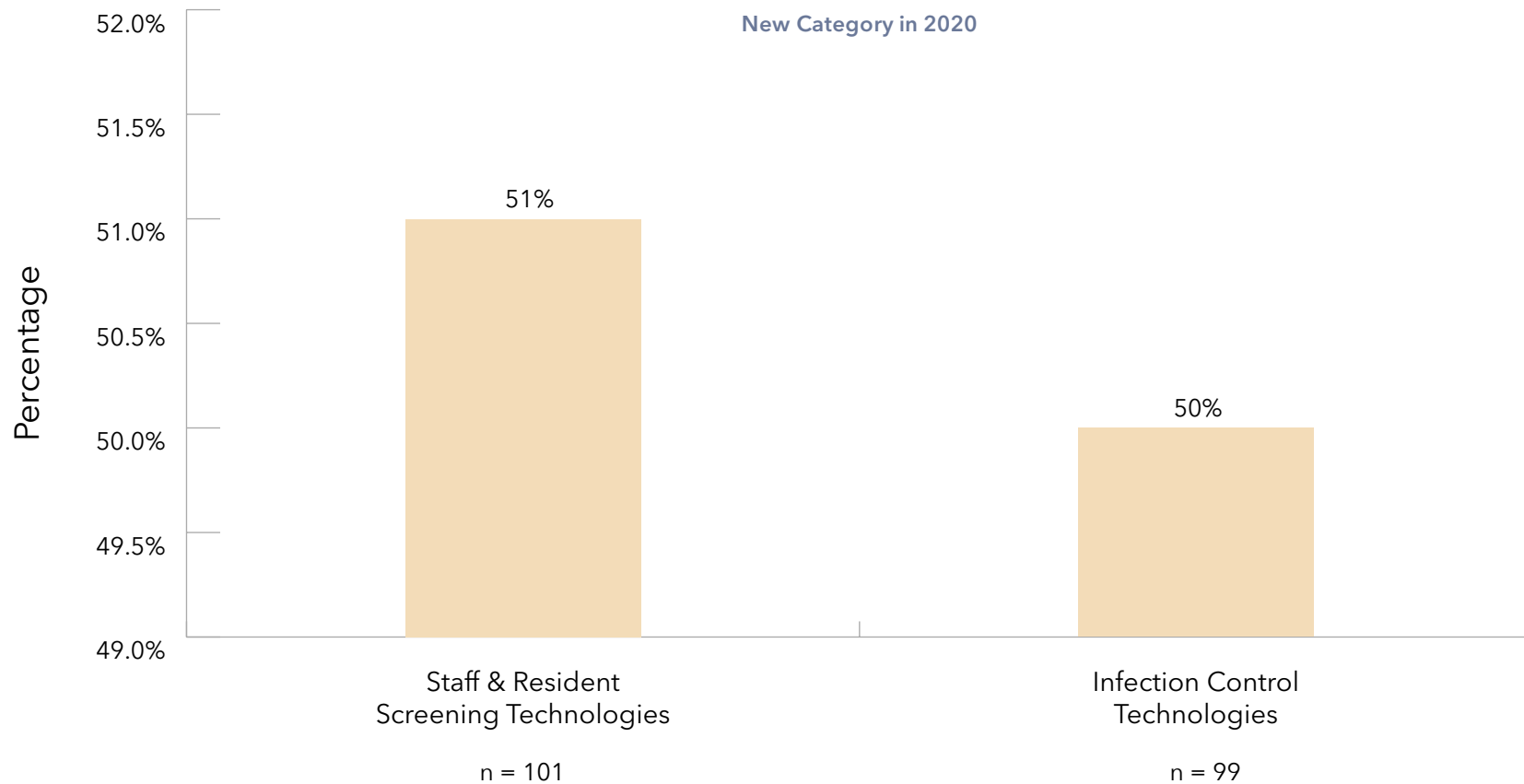
KEY:



*Reflects LZ 200 increase with 2018 report

Organizational Characteristics: Technology Adoption

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



KEY: ■ 2020*

*Reflects LZ 200 increase with 2018 report

Organizational Characteristics: Technology Adoption

Type of EMR/EHR Technology

Type of EMR/EHR Technology	
Most Mentions	# of Mentions
PointClickCare	57
MatrixCare	35
Netsmart/MyUnity	30
American Data	4
American HealthTech	3
Eldermark	3
Other	27

n = 132

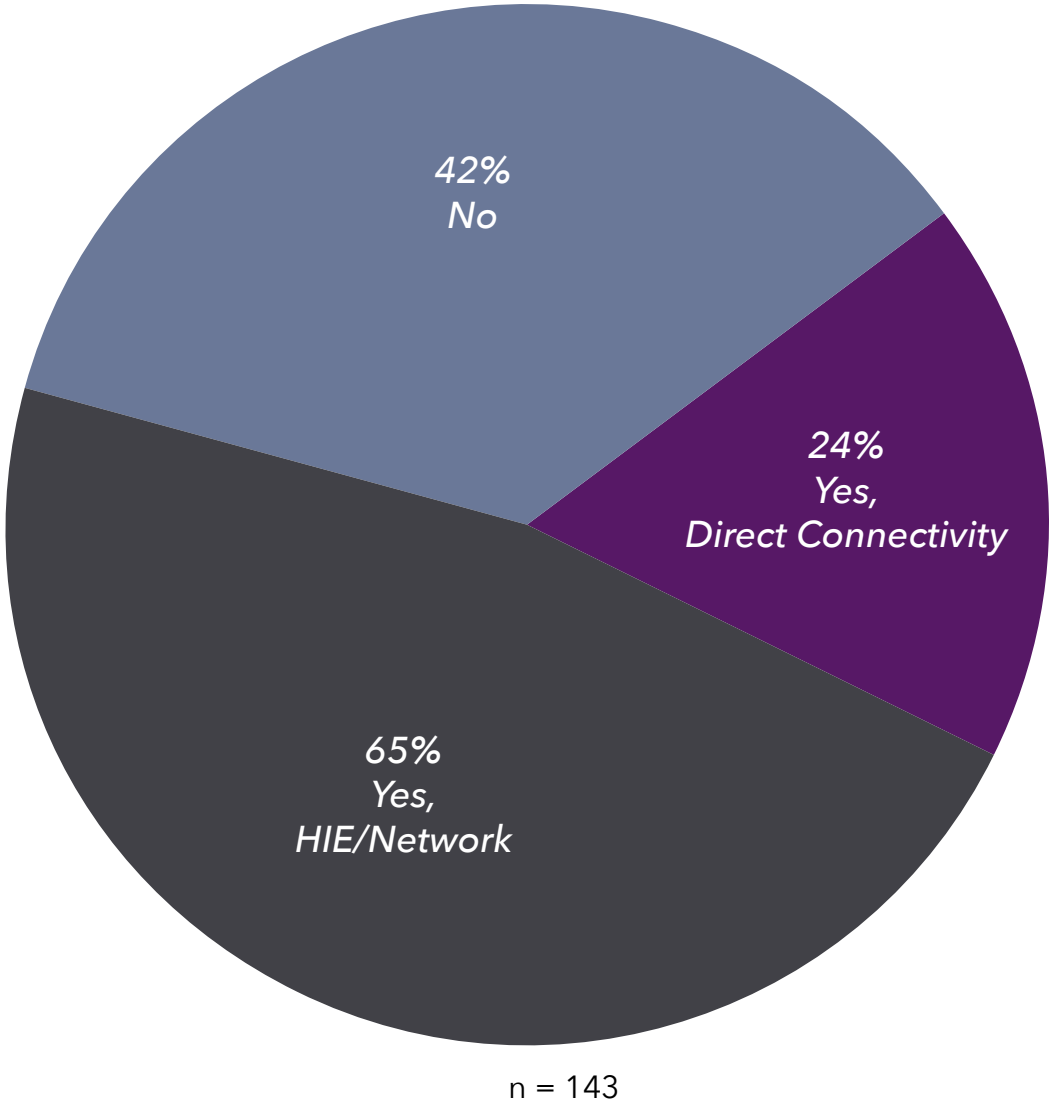
159 responses, but multiple mentions

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

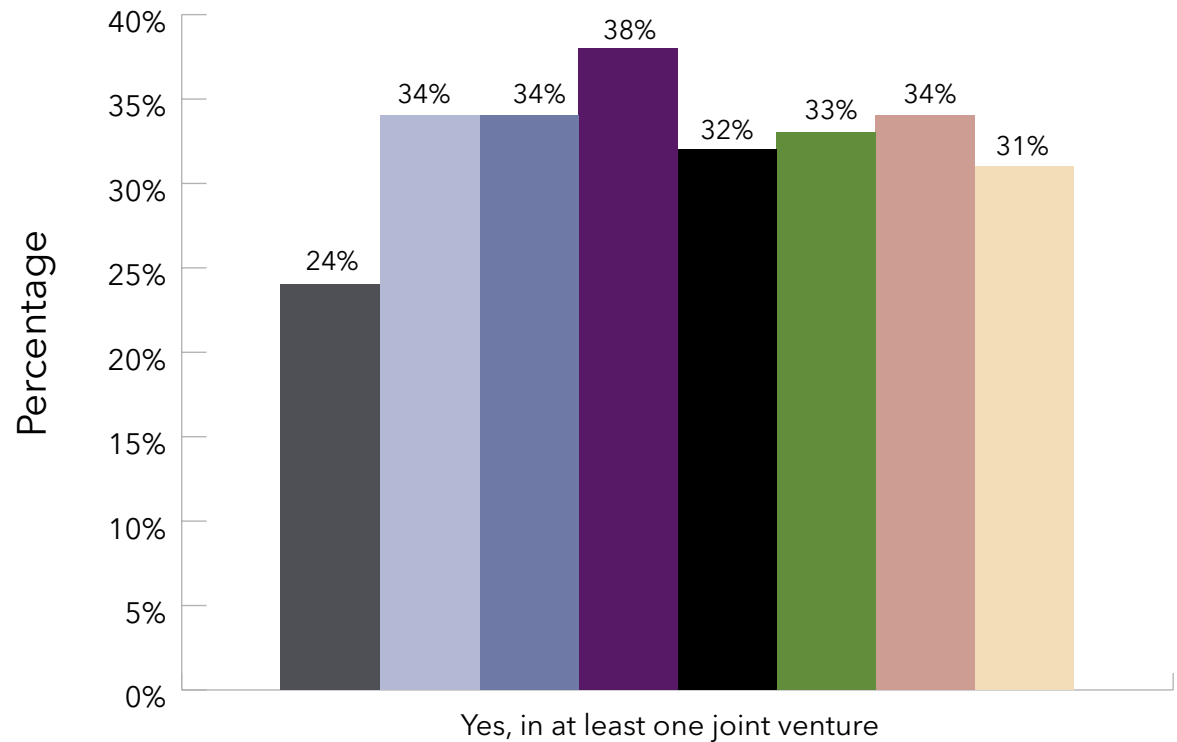


Organizational Characteristics: Joint Ventures

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. Slightly more than forty percent (40%) of the organizations are in a formal ACO or bundled payment contract for formal health care reform.



KEY:

- 2013*
- 2017**
- 2014*
- 2018**
- 2015*
- 2019**
- 2016*
- 2020**

*Reflects increase to LZ 150 with 2014 report

** Reflects LZ 200 with 2018 report

n = 146

Organizational Characteristics: Joint Ventures

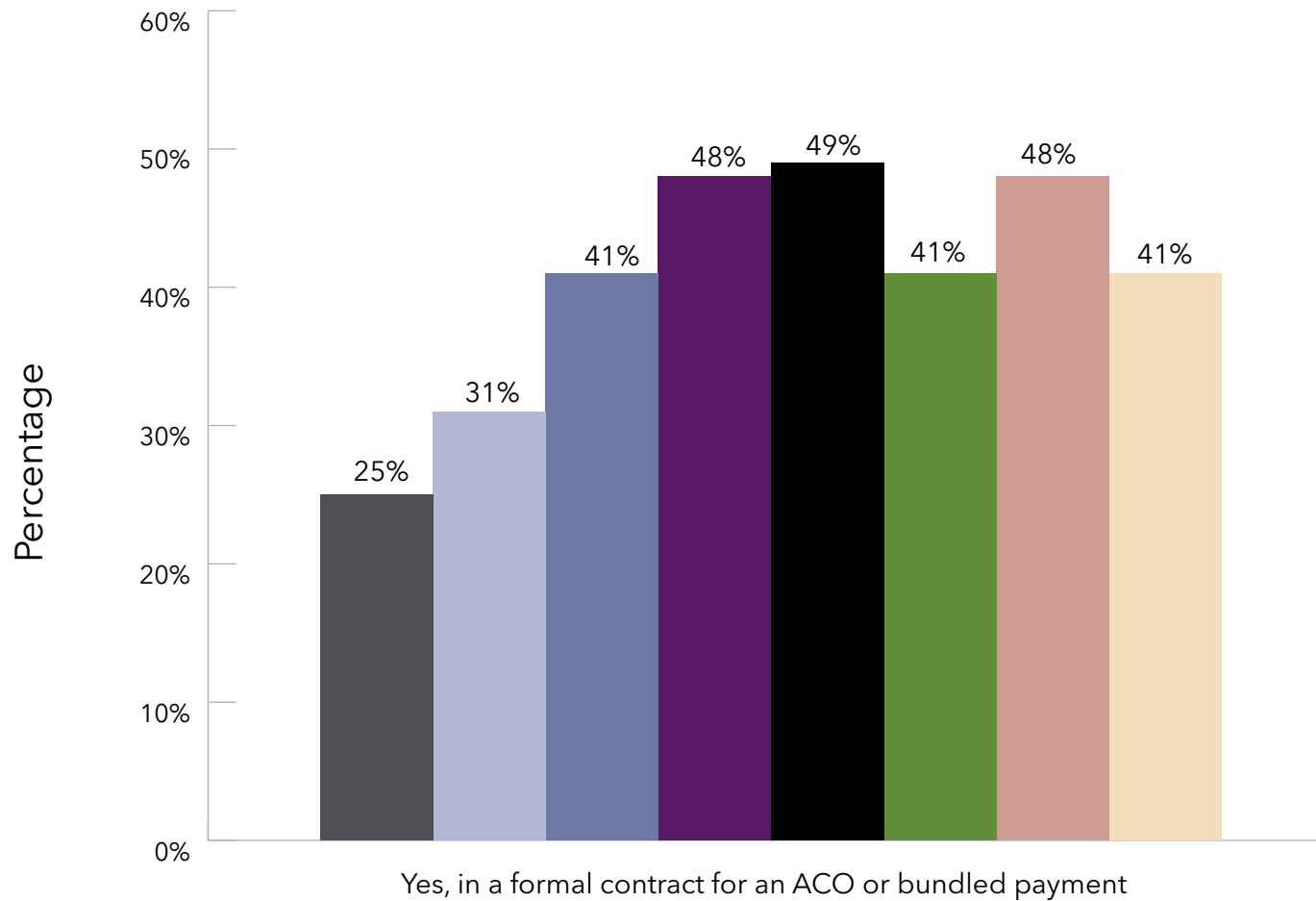
Type of Joint Venture

Type of Joint Venture	
Most Mentions	# of Mentions
Another NFP Senior Living Provider	42
Home Health/Home Care	28
Hospital/Health System	22
Physician's Group	18
HUD/Affordable Housing	17
Hospice	16
Rehabilitation/Therapy	14
Case Management	13
PACE	9
Church/University	6

n = 58

58 responses, but multiple mentions

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



KEY:

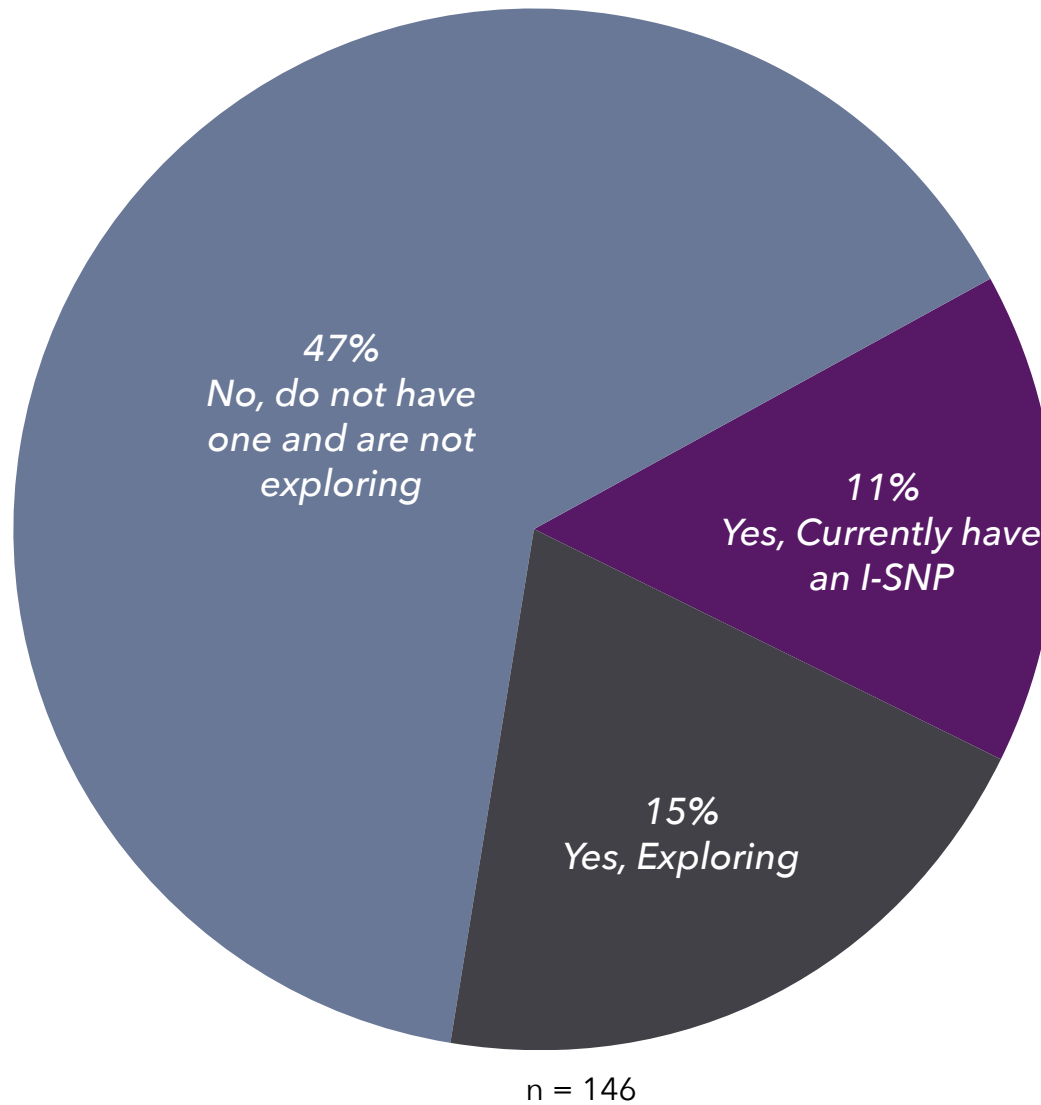
- 2013*
- 2015*
- 2017**
- 2019**
- 2014*
- 2016*
- 2018**
- 2020**

*Reflects increase to LZ 150 with 2014 report

** Reflects LZ 200 with 2018 report

n = 146

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



Chapter 5

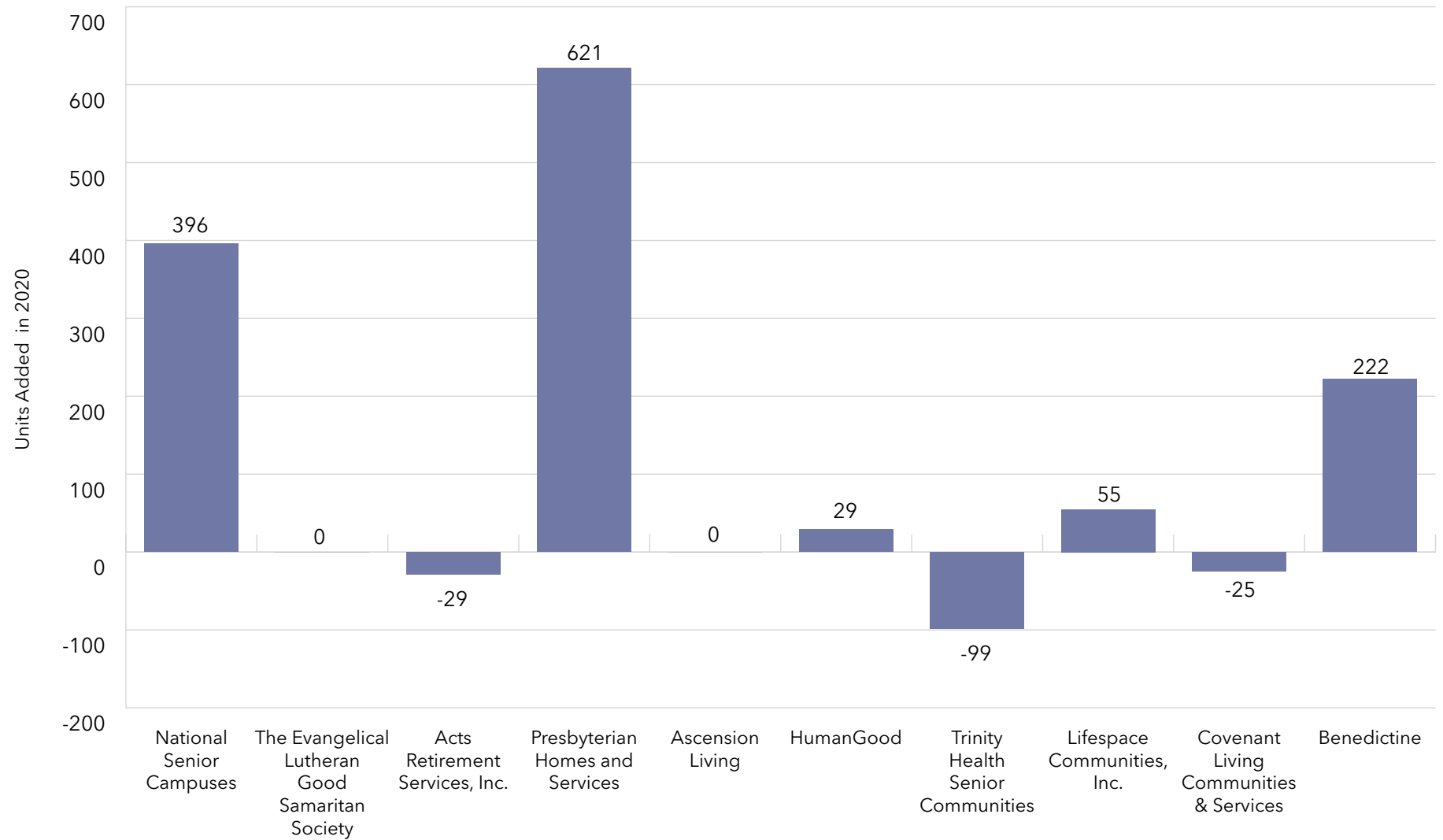
Growth and Change

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.

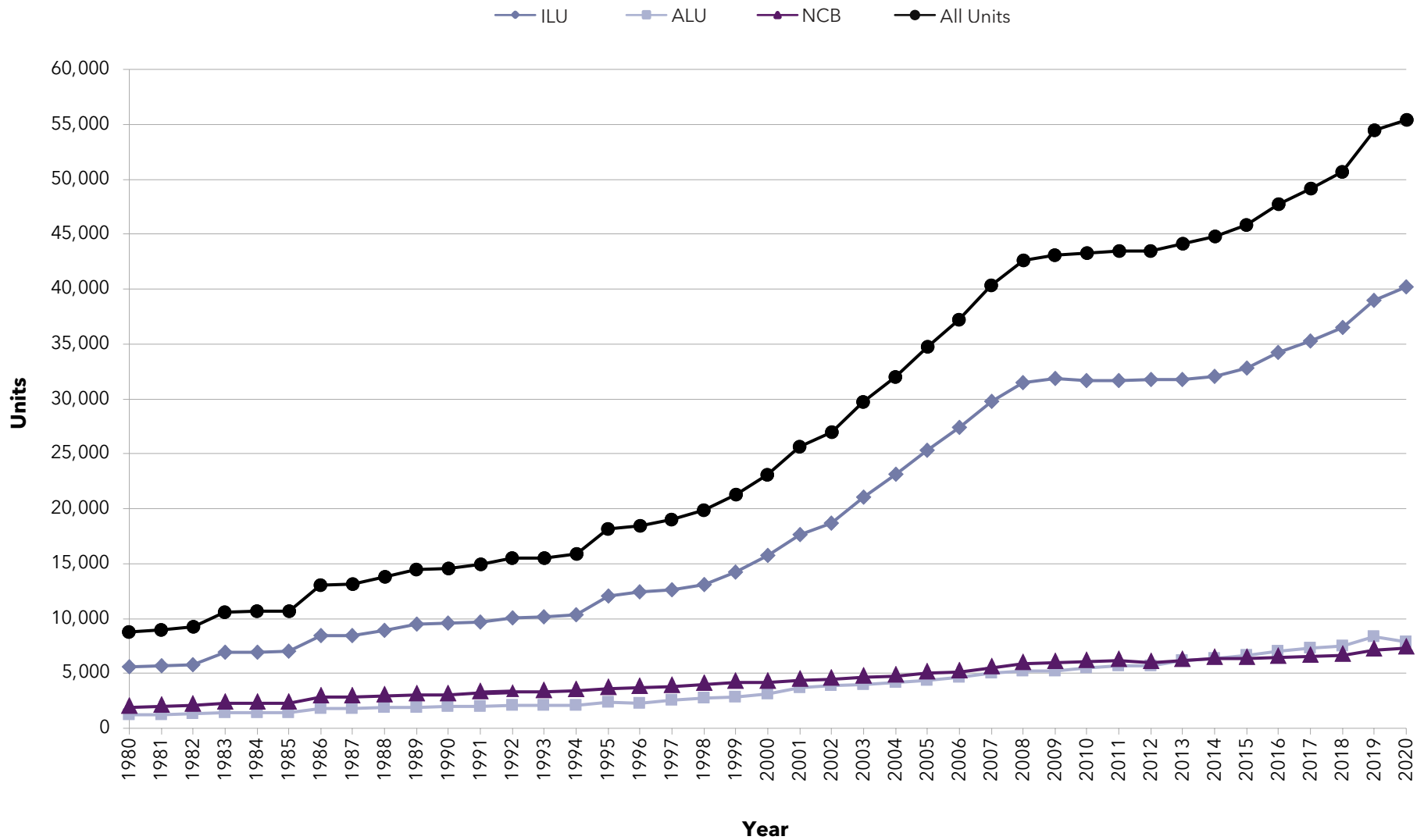




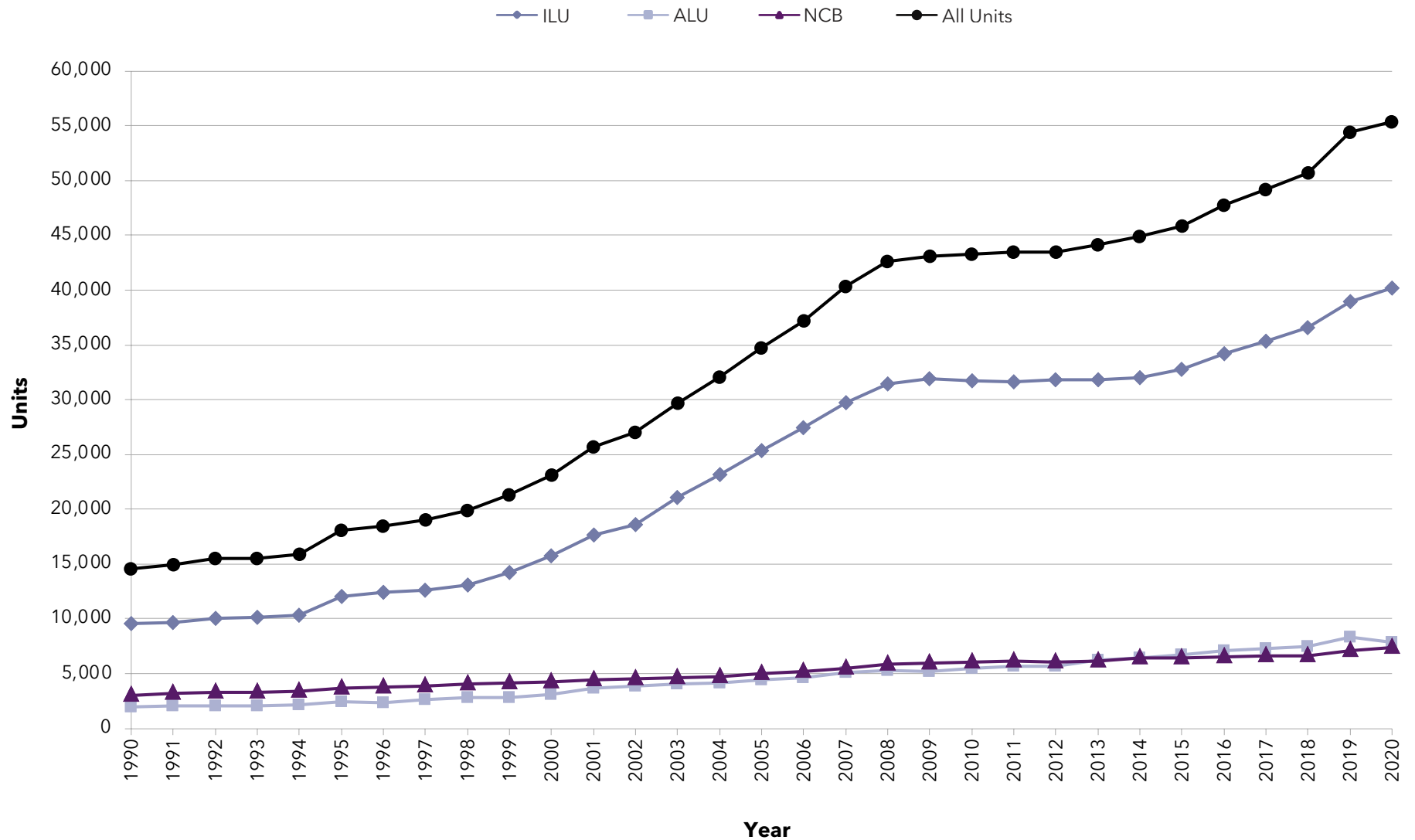
Growth: Growth of Largest 10 Systems



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)

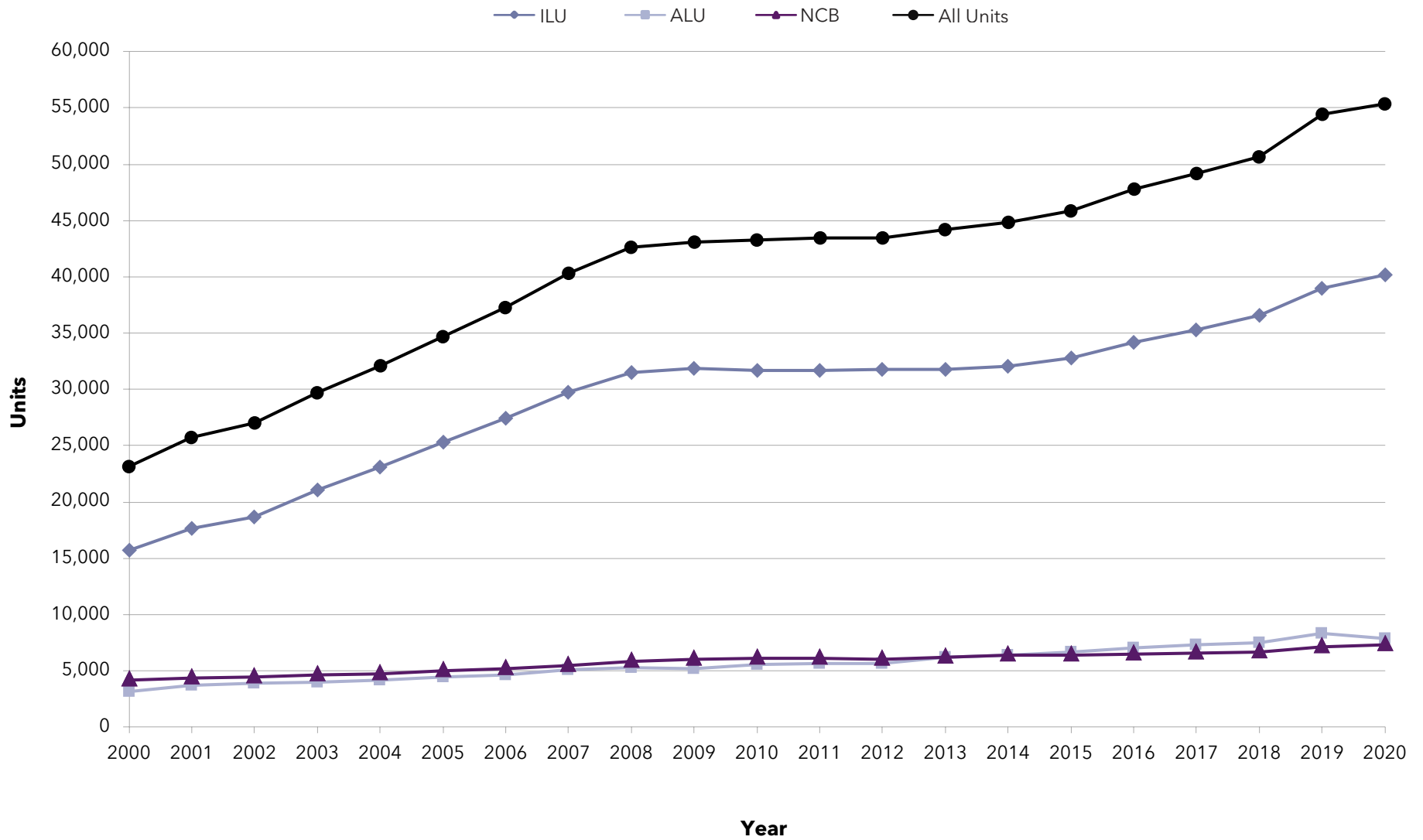


Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1990 (Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



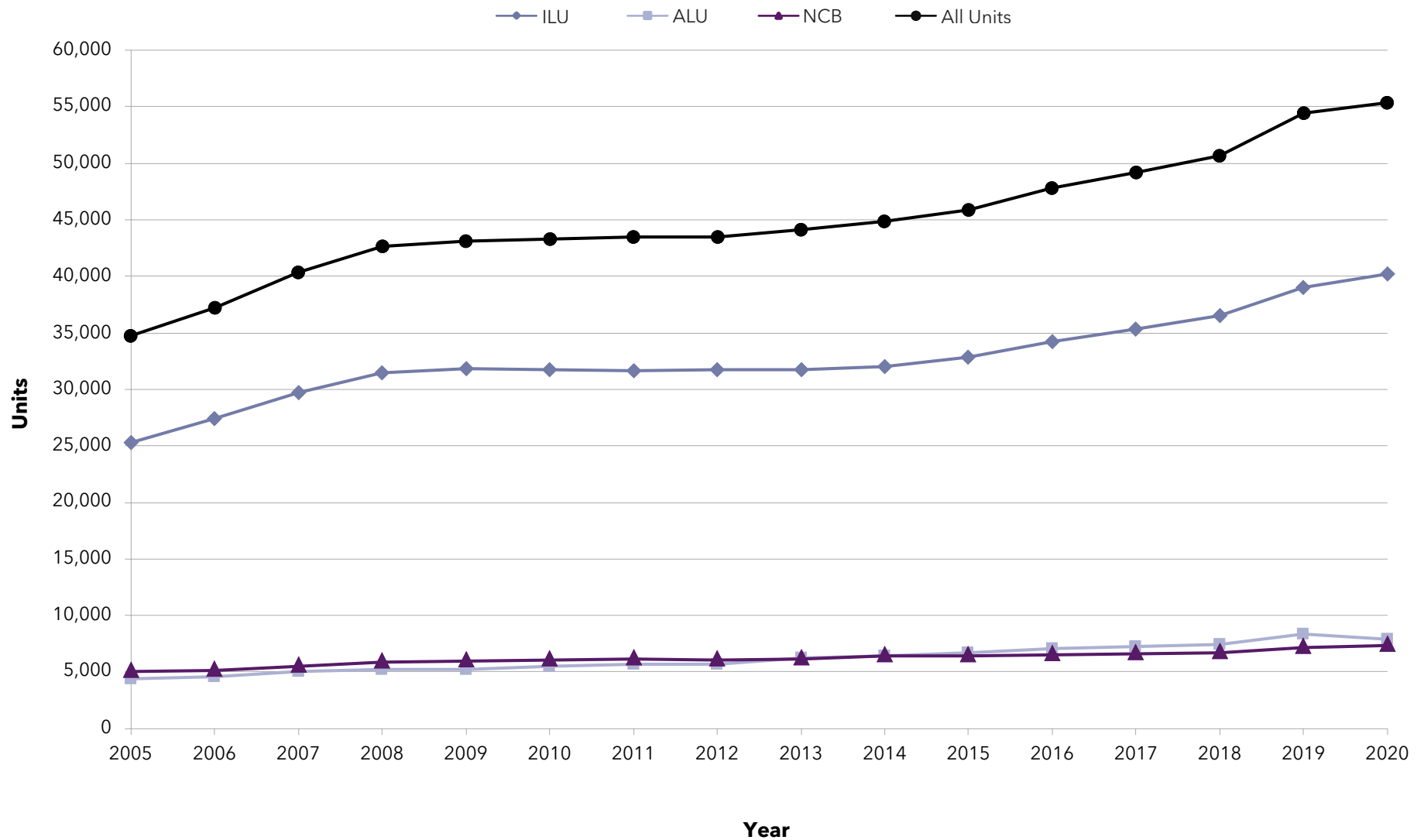
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2000

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



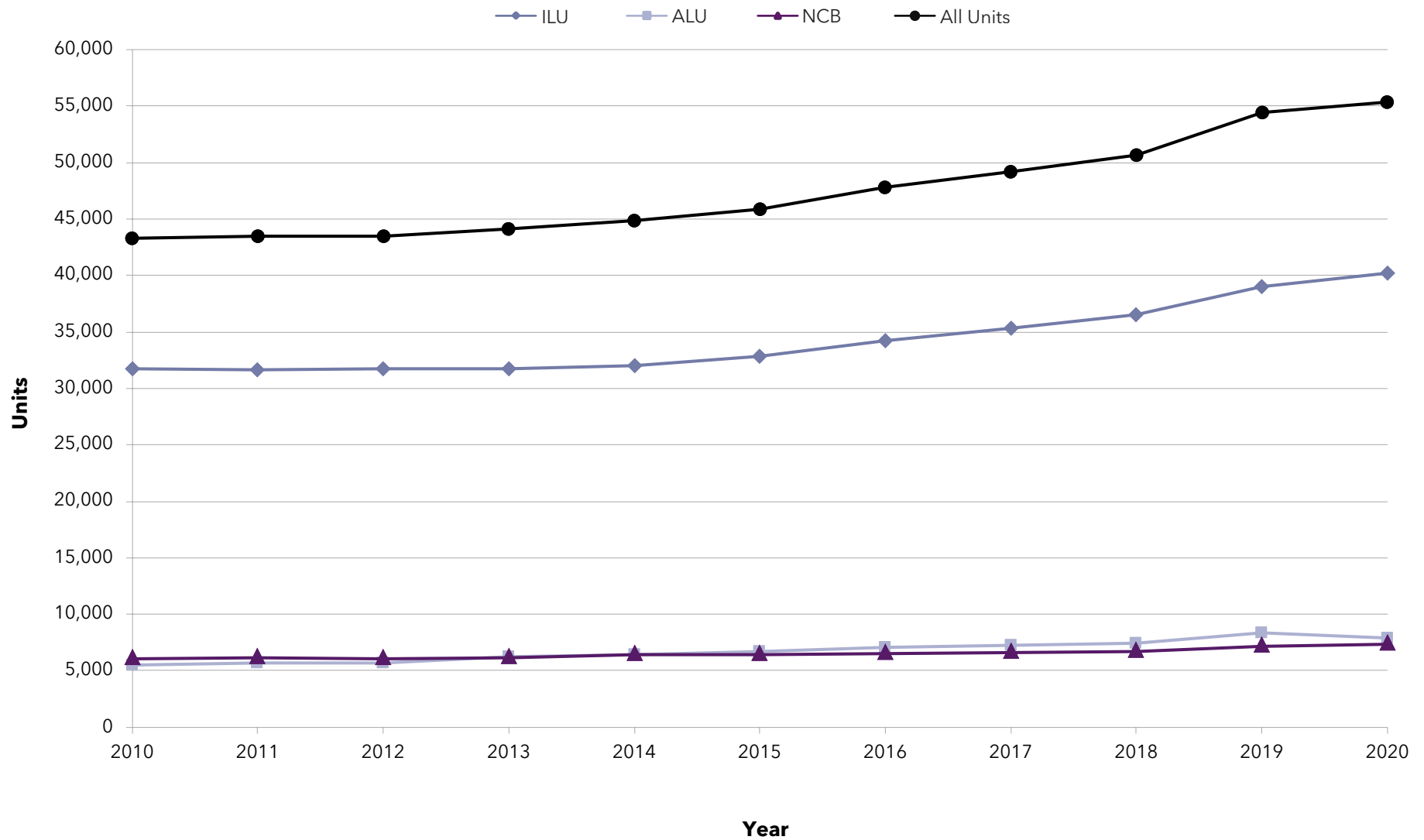
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005

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



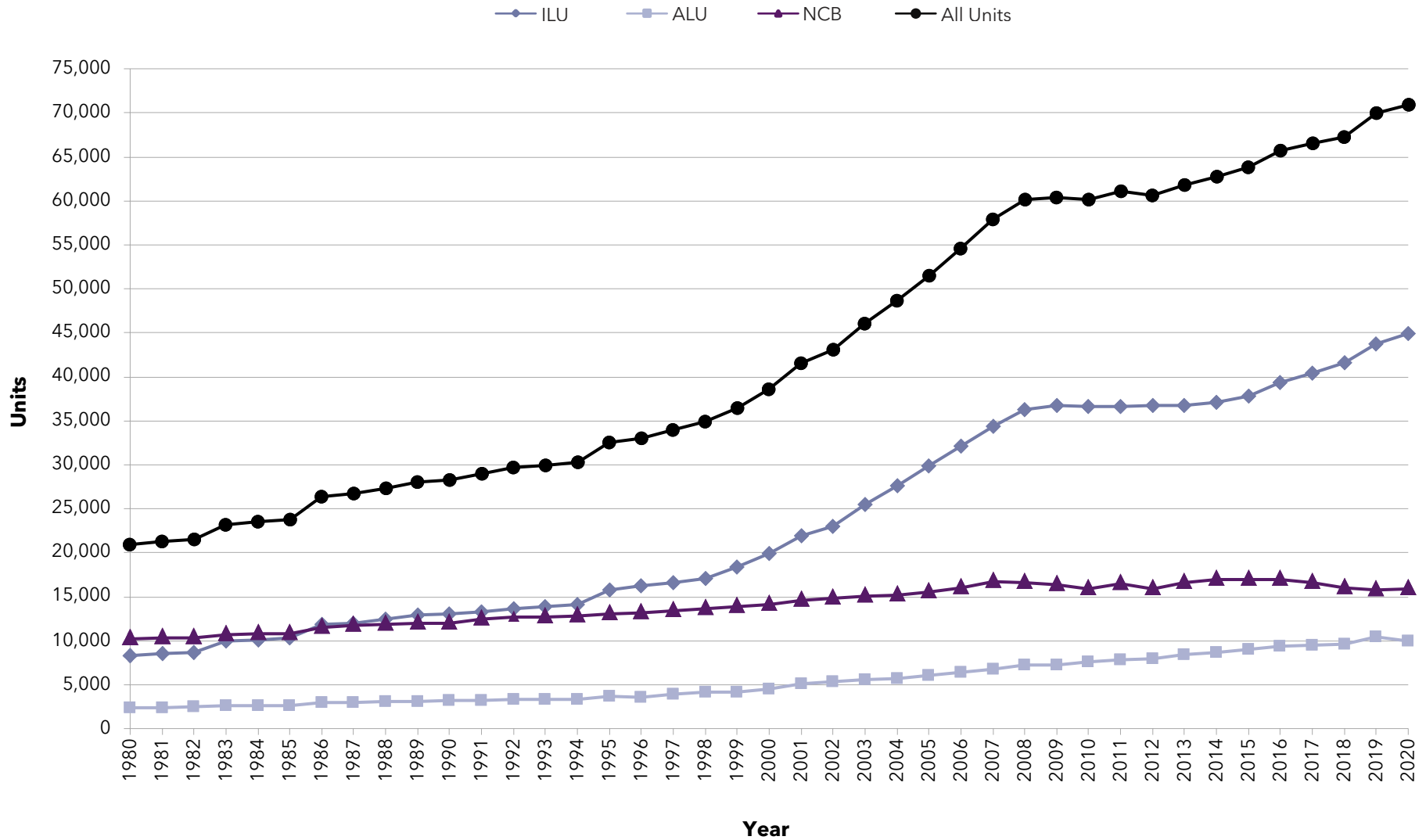
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2010

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



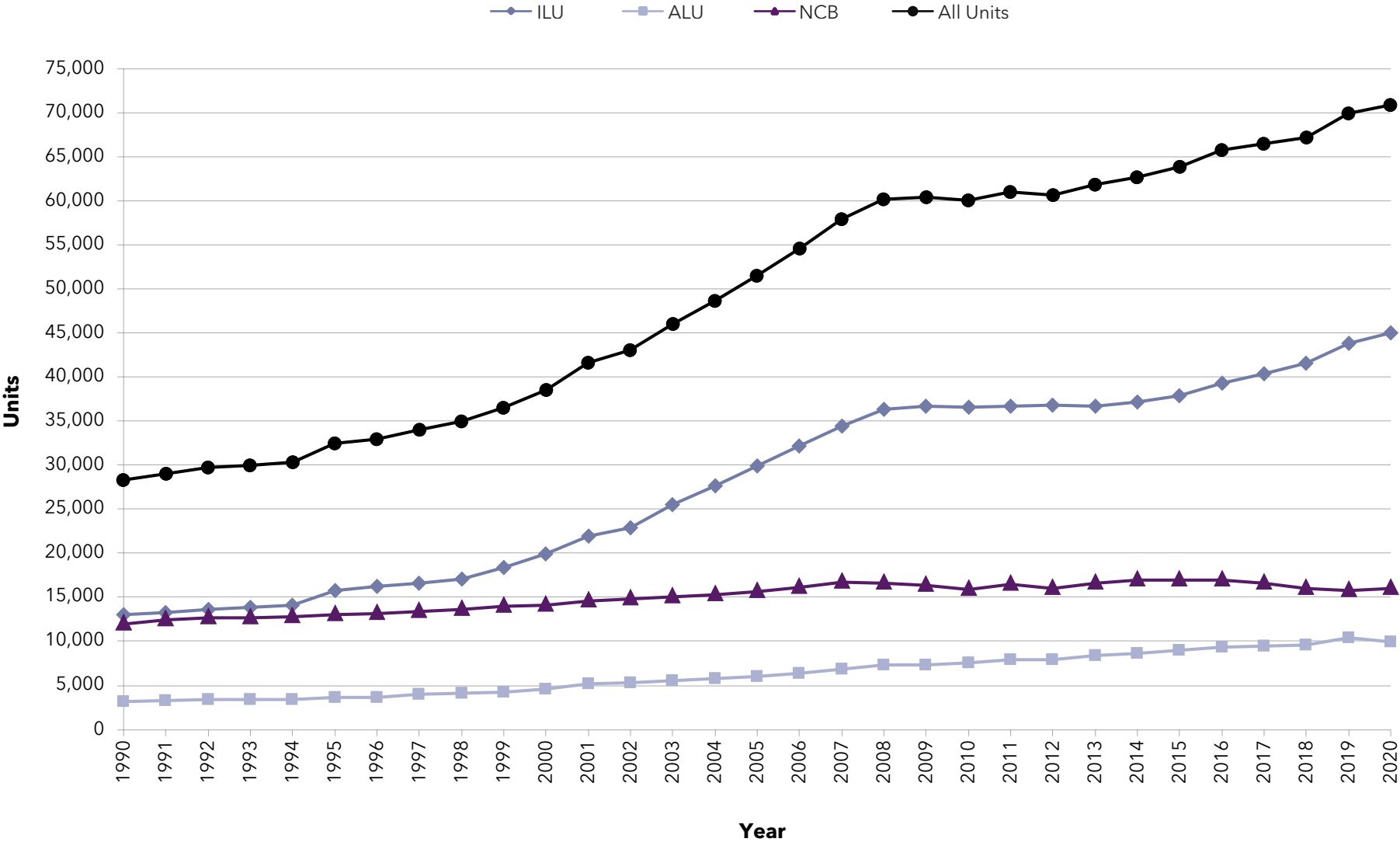
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1980

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



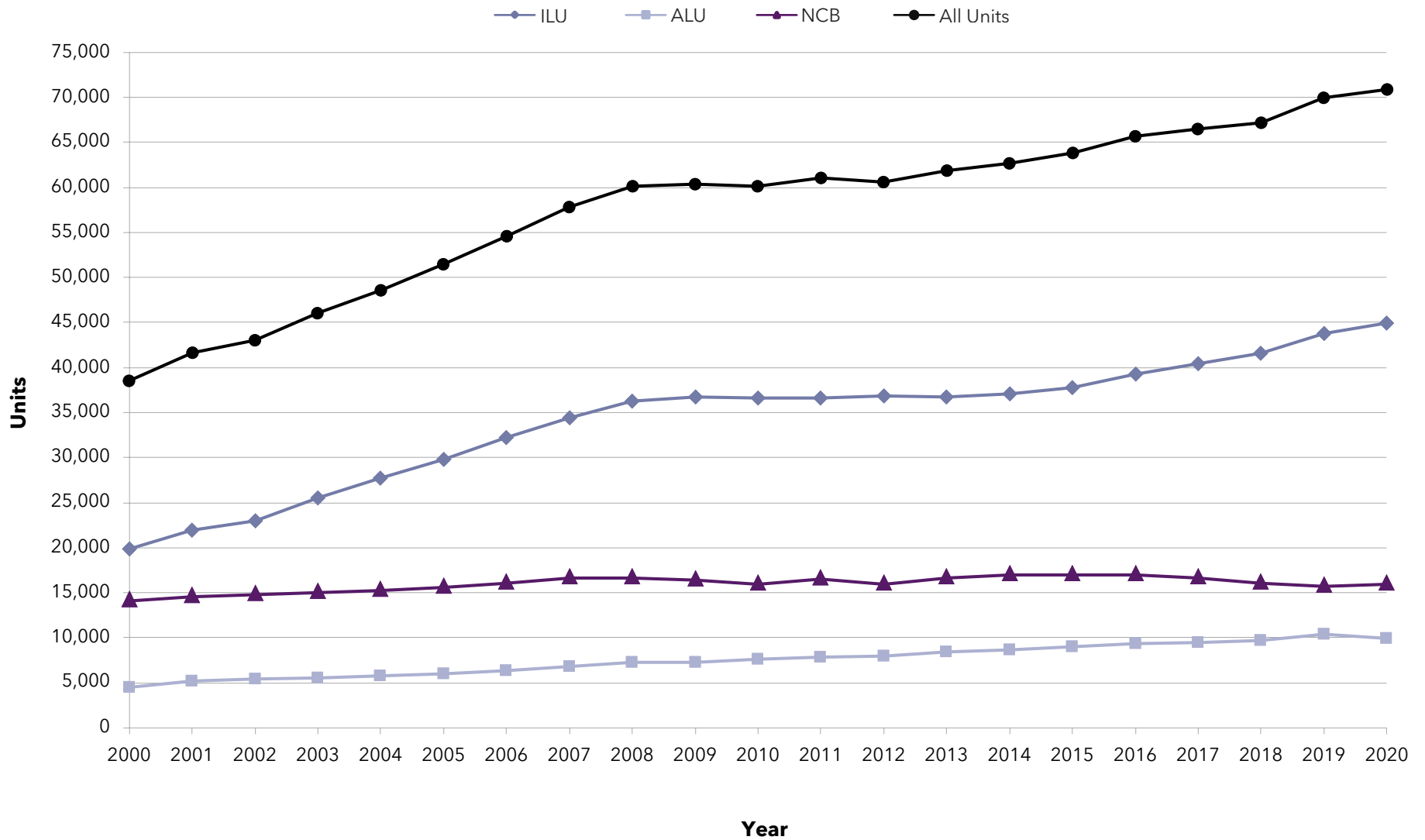
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1990

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

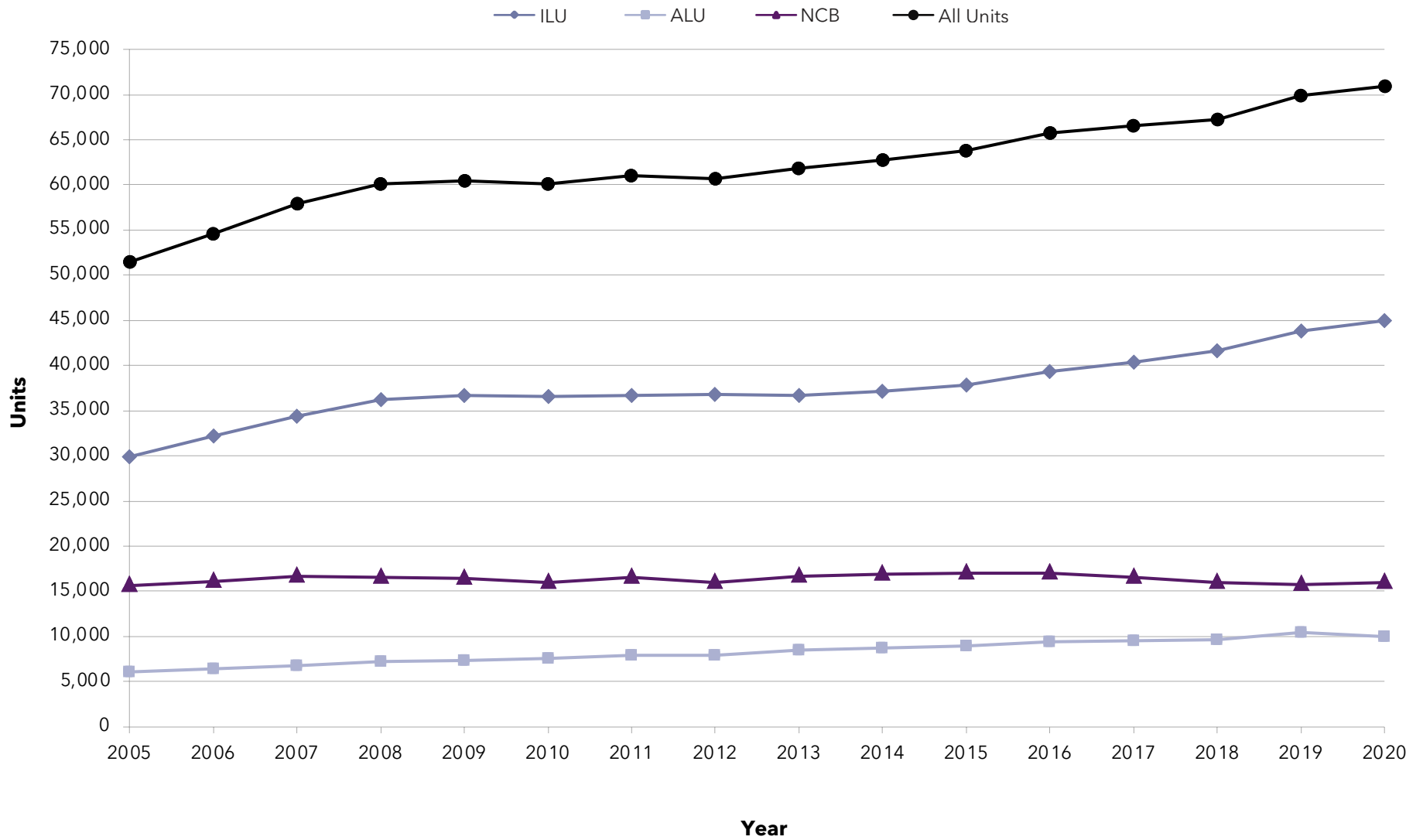


Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2000

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

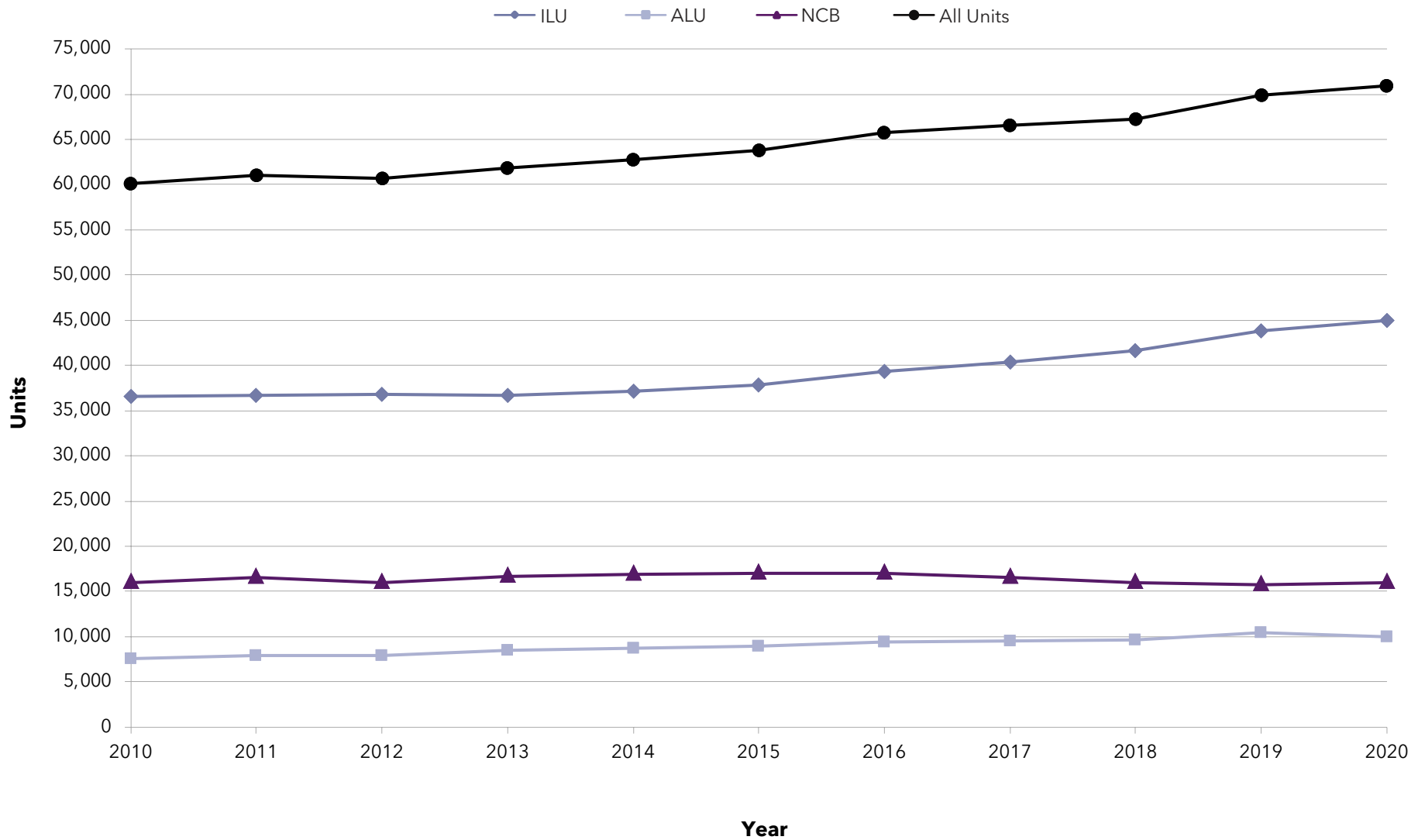


Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005 (Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



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 #5), Trinity Health Senior Communities (LZ 200 #7), Benedictine Health (LZ 200 #10), and The Carmelite System (LZ 200 #21). The Pace of Growth charts show the different methods of change the systems are

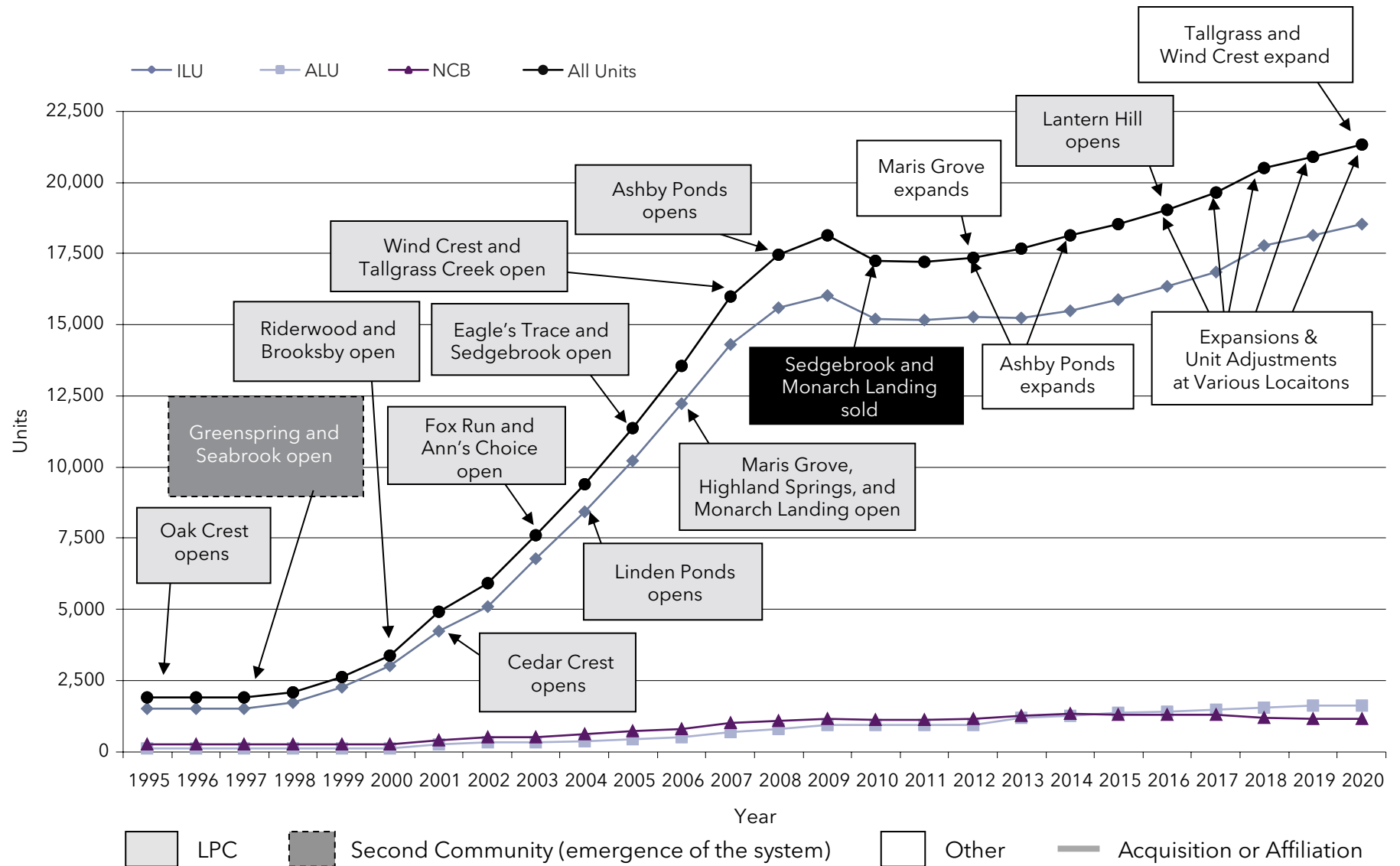
employing. Significant new community construction and expansions are noted, with the addition of the second community highlighted in a dashed box. Mergers and acquisitions (gray-framed box) and dispositions (bold black box) are also highlighted.

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.



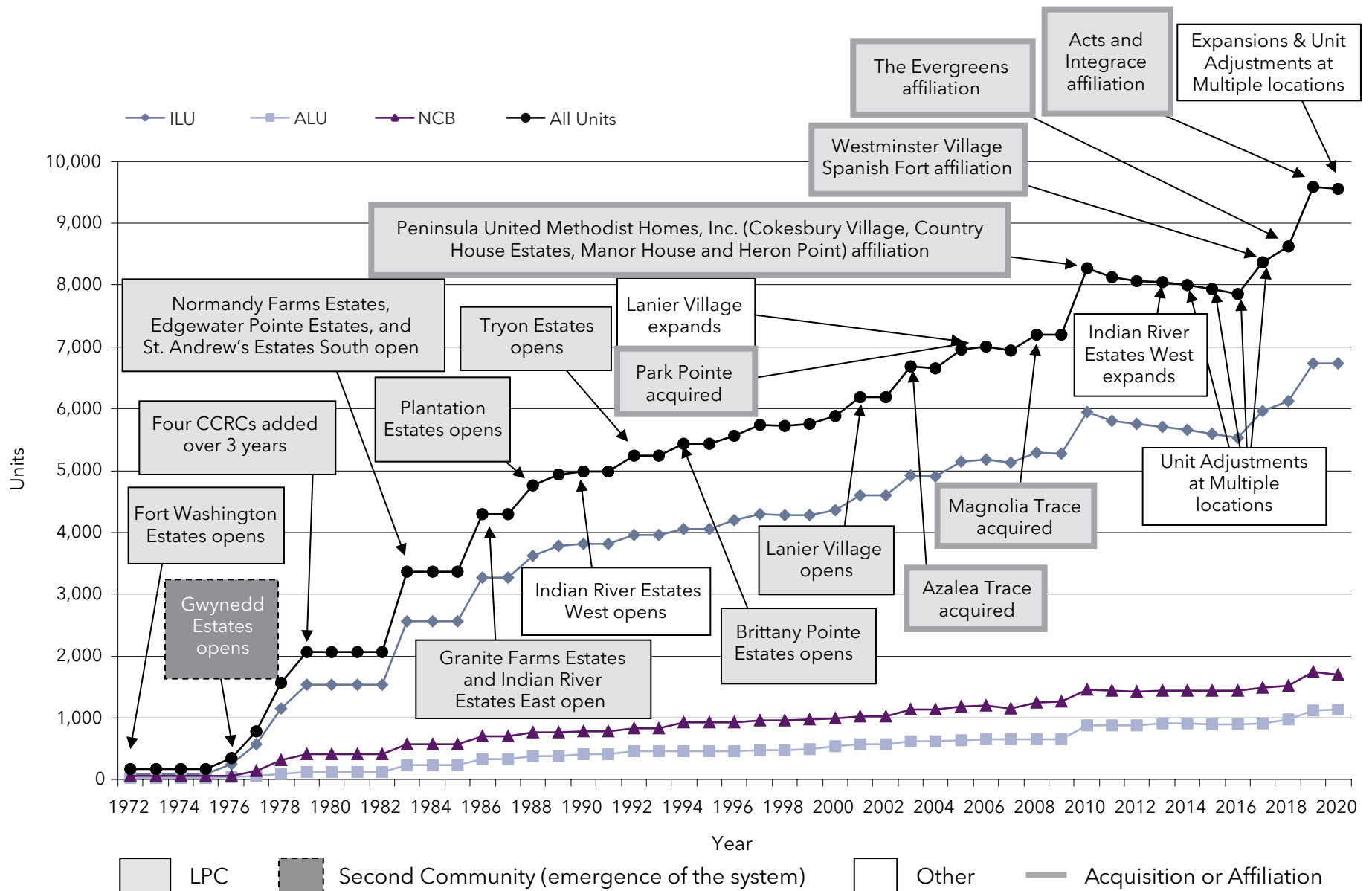
Growth: Pace of Growth

National Senior Campuses (MA)



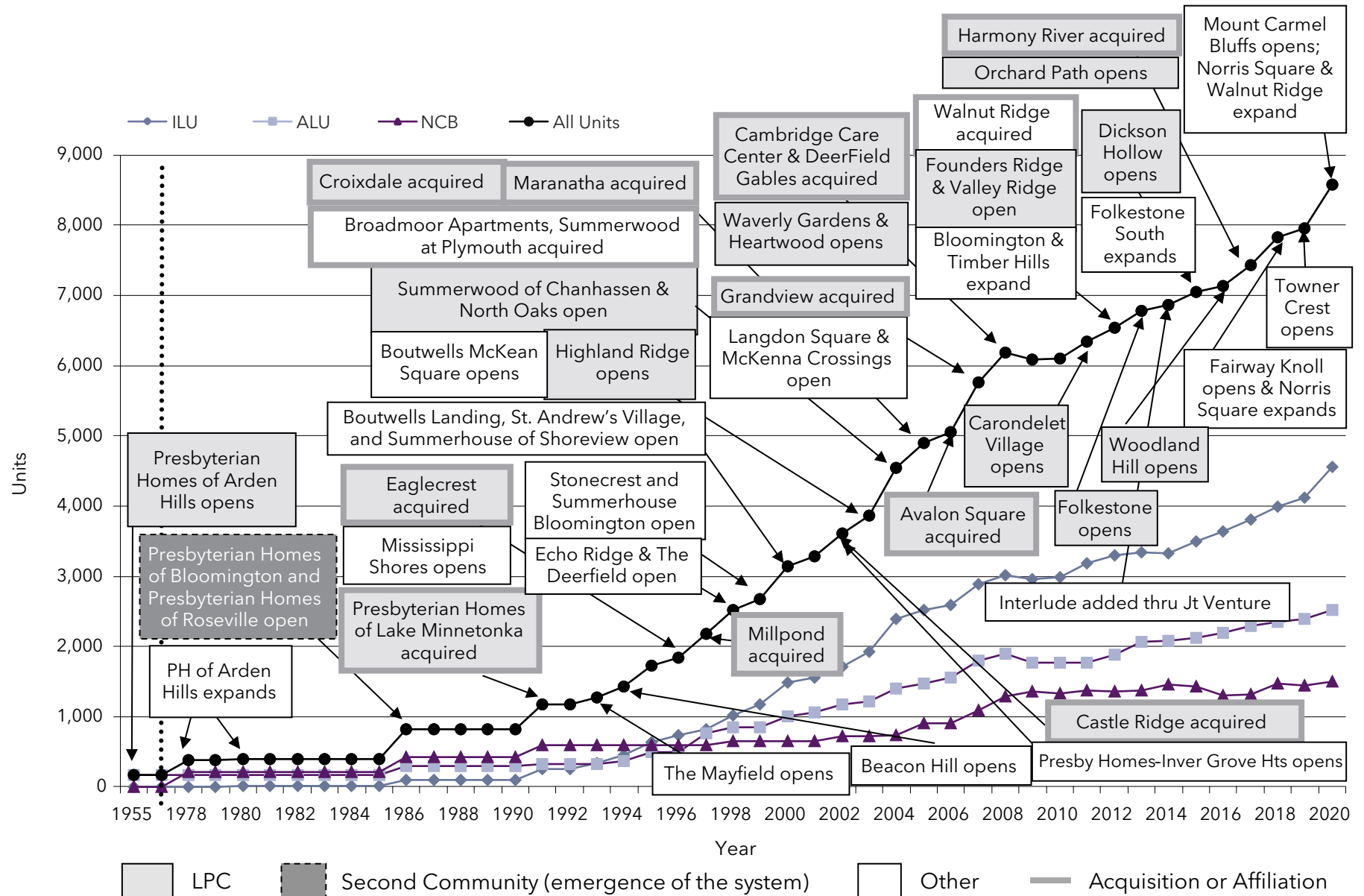
Growth: Pace of Growth

Acts Retirement-Life Communities (PA)

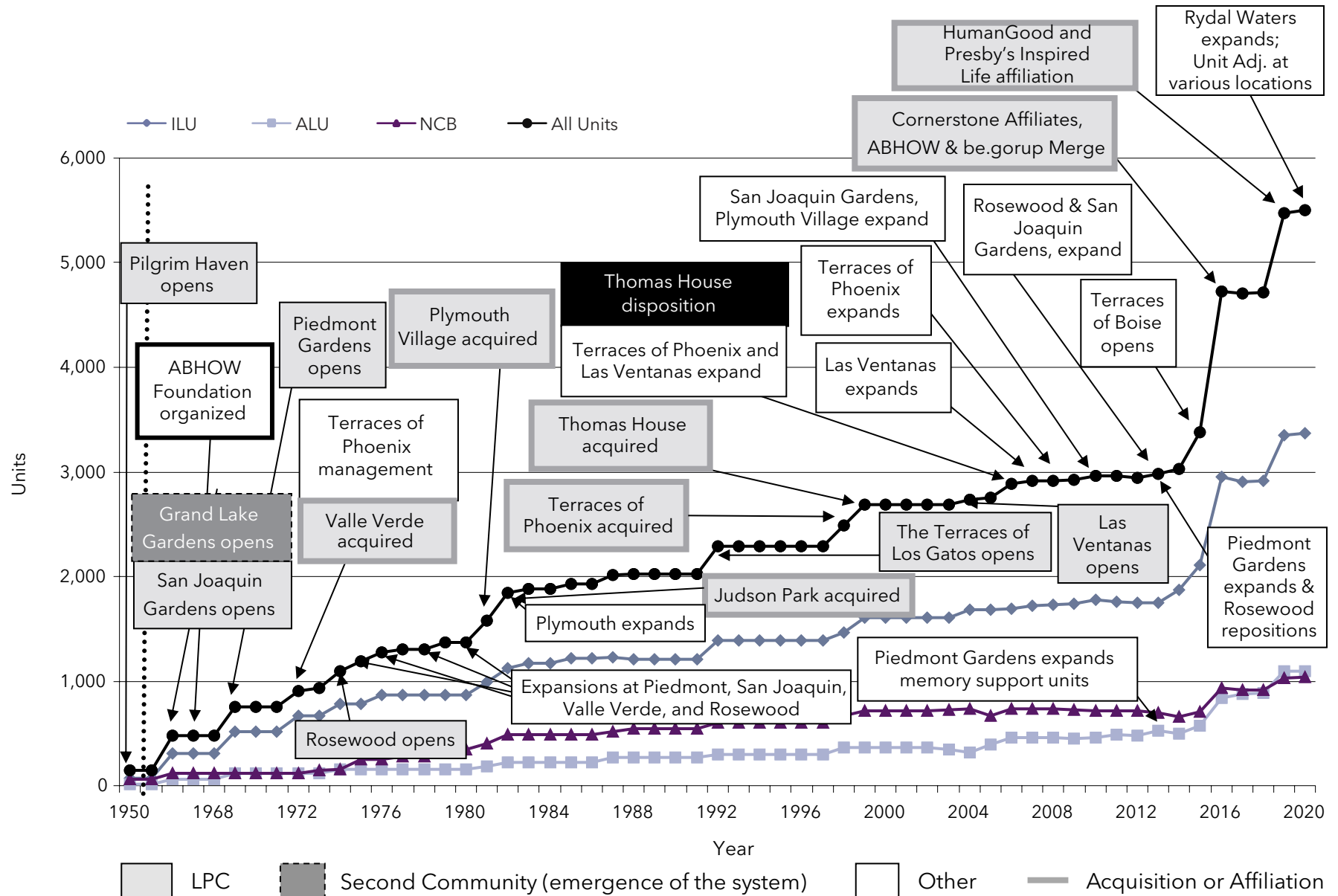


Growth: Pace of Growth

Presbyterian Homes and Services (MN)

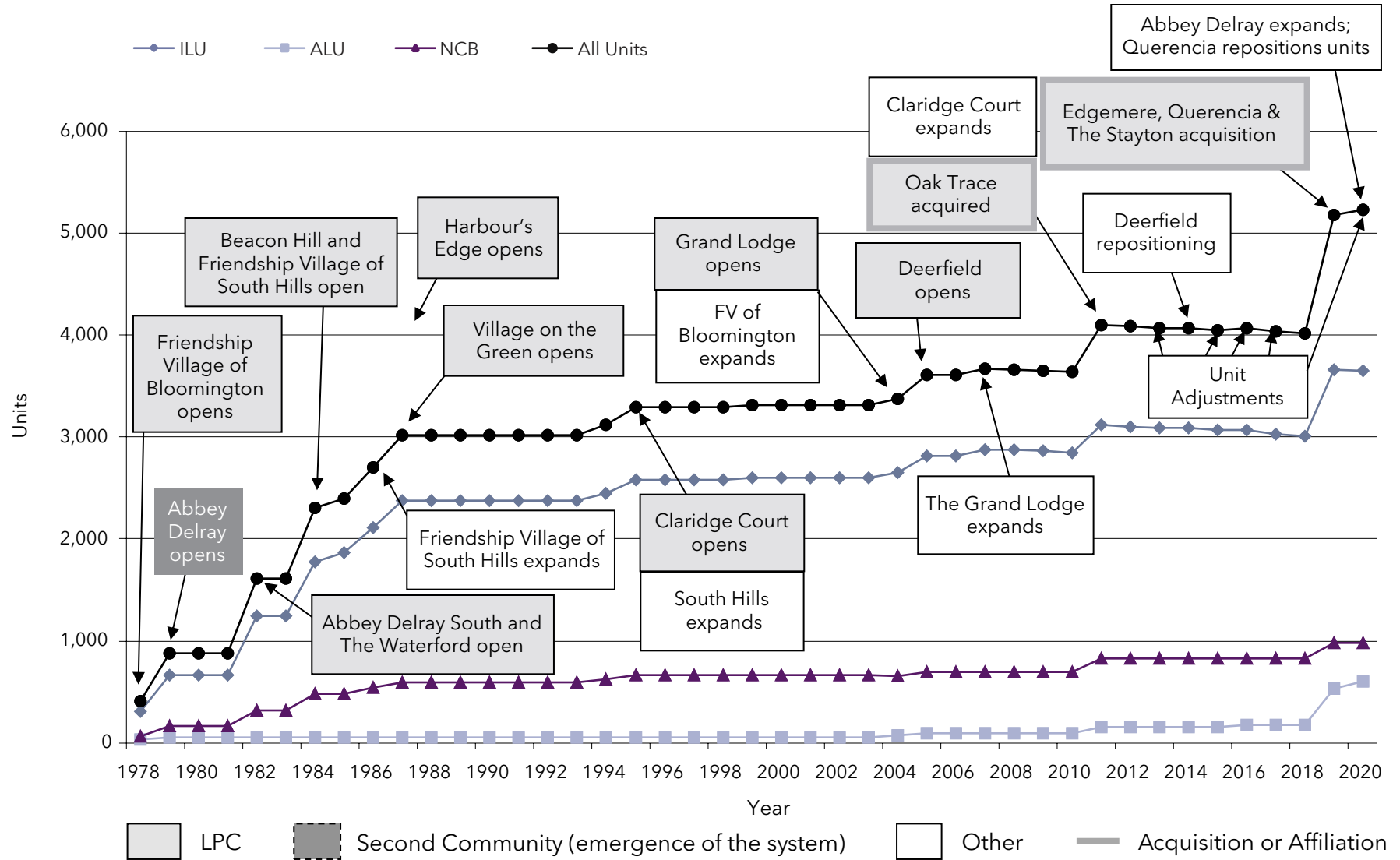


Growth: Pace of Growth HumanGood (CA)



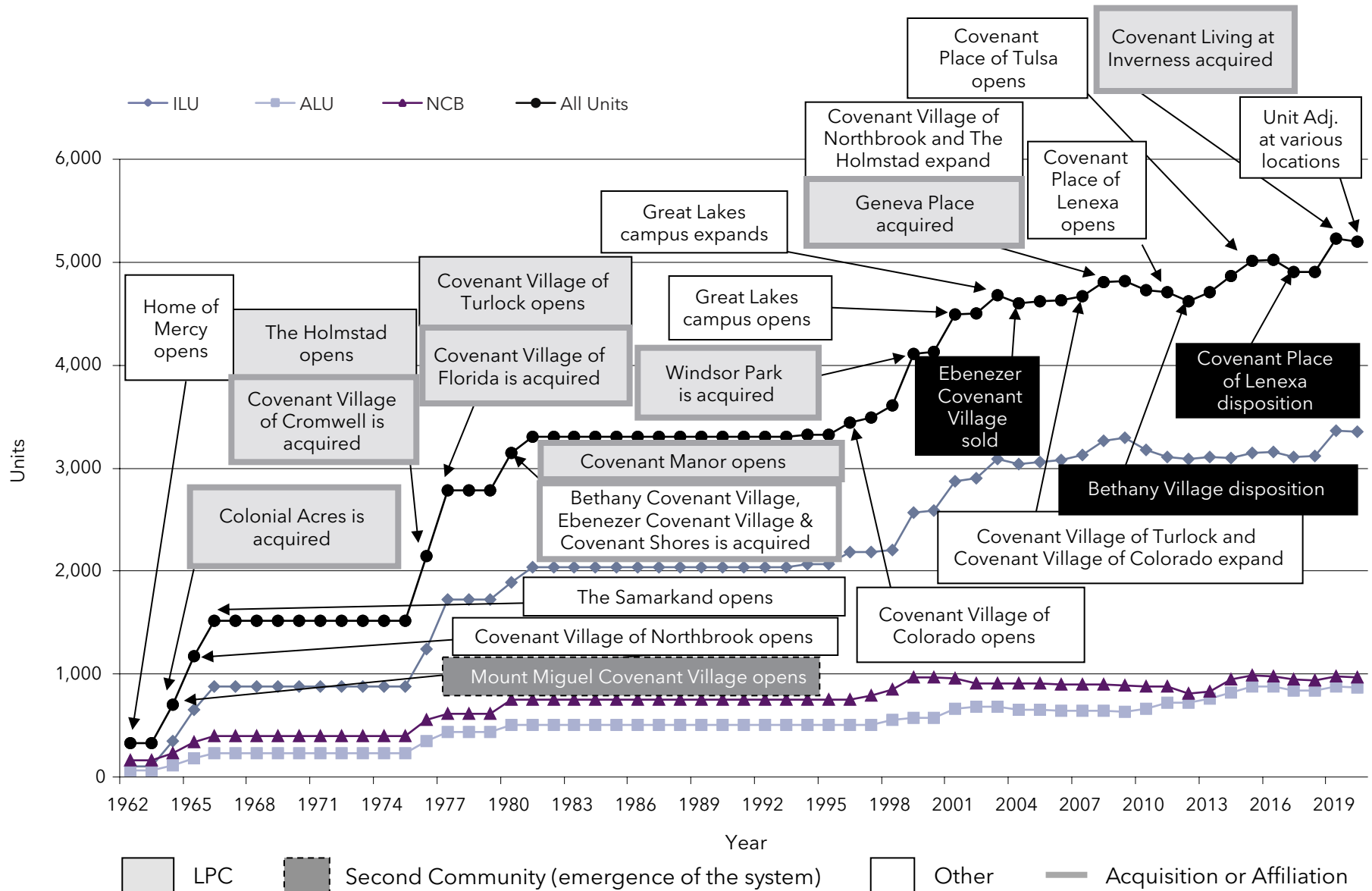
Growth: Pace of Growth

Lifespace Communities, Inc. (IA)



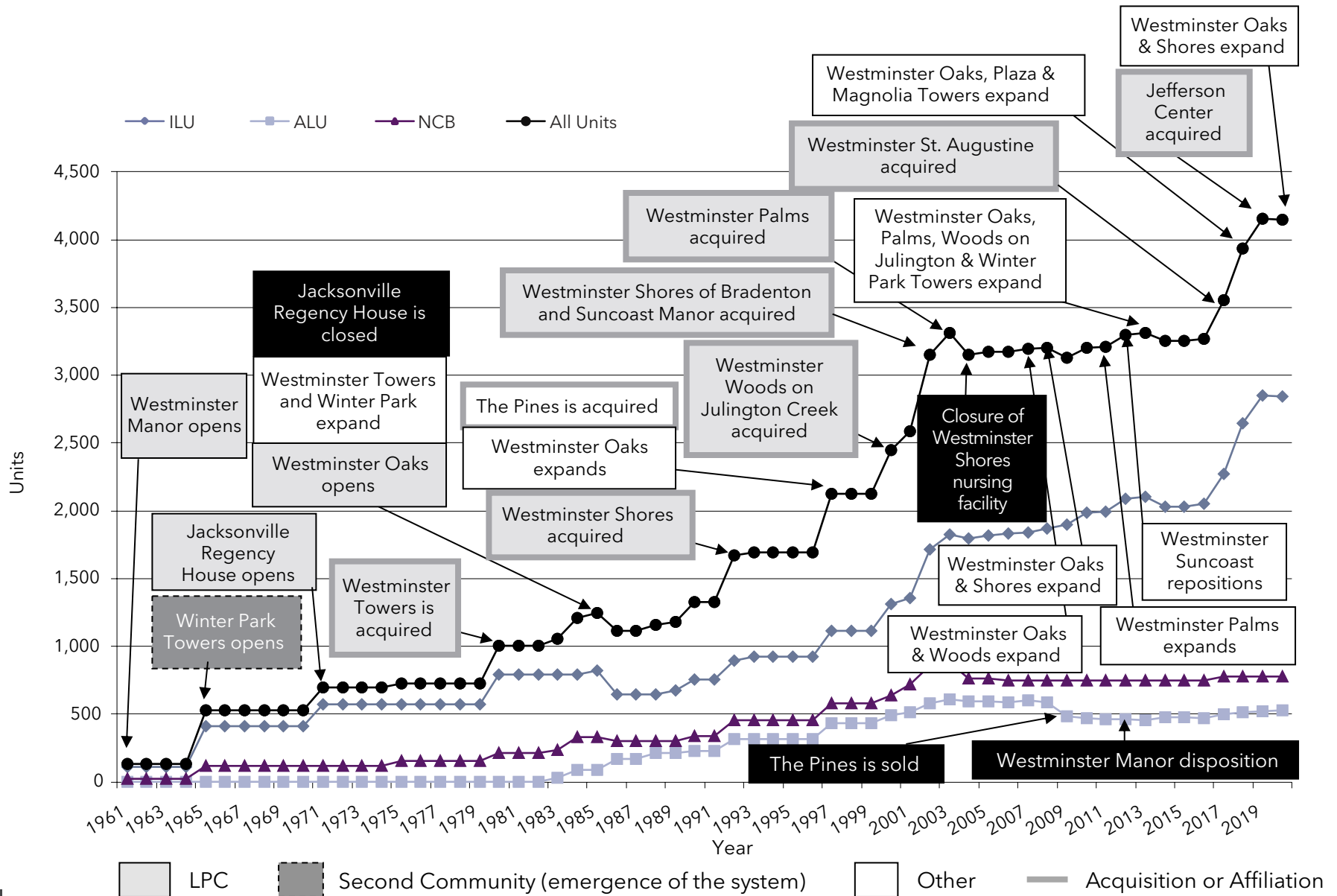
Growth: Pace of Growth

Covenant Living Communities & Services (IL)



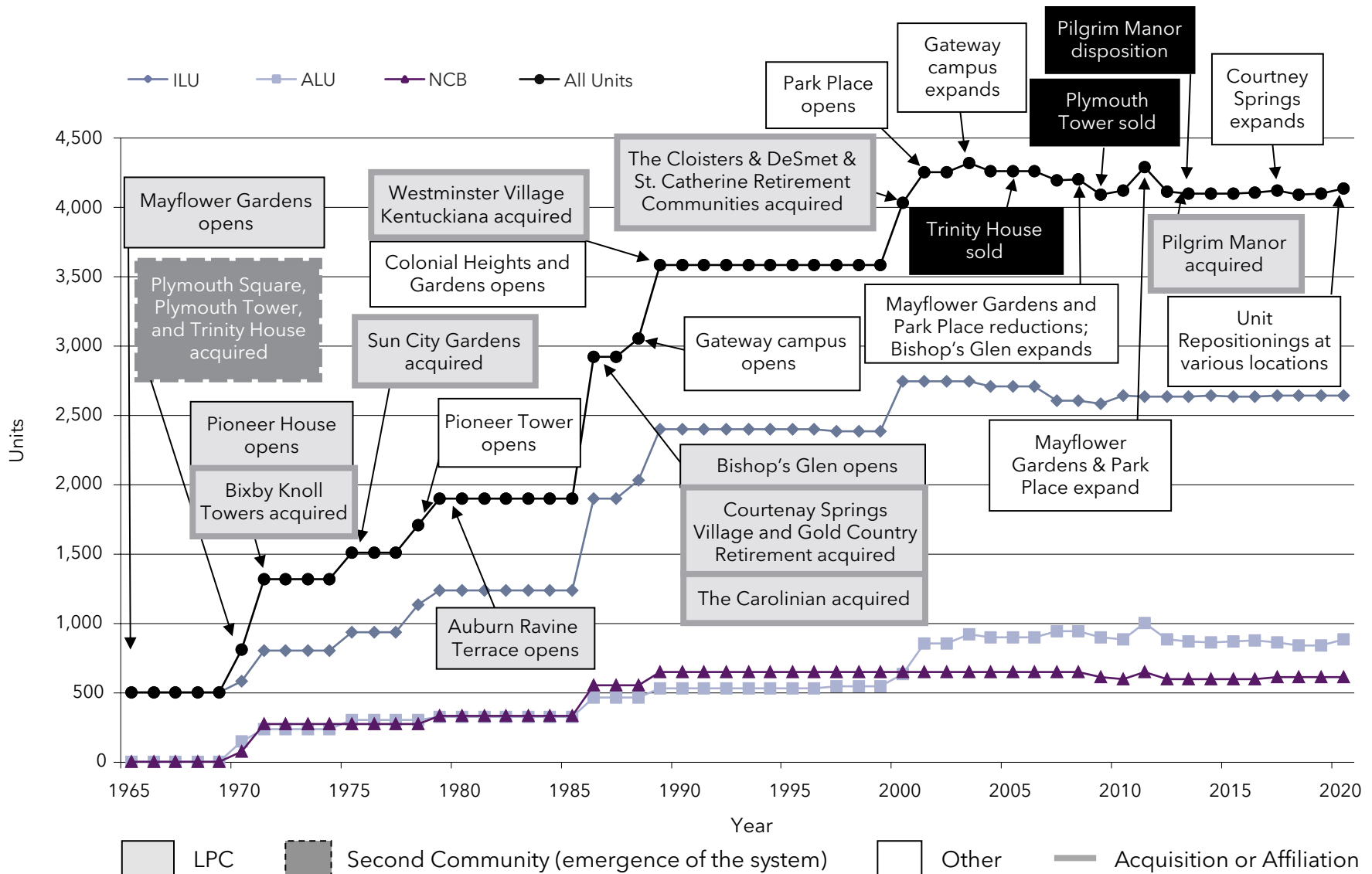
Growth: Pace of Growth

Westminster Communities of Florida (FL)



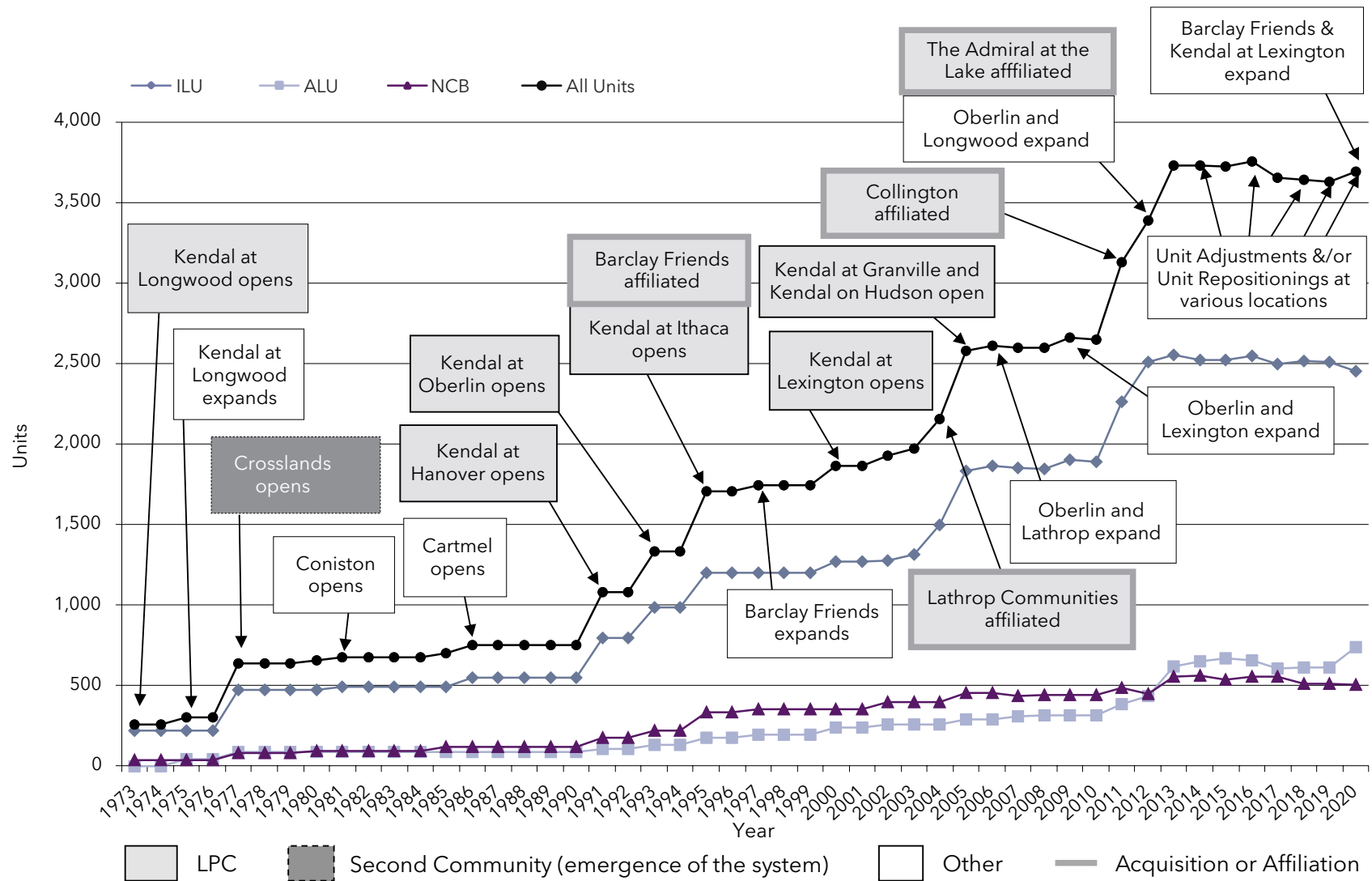
Growth: Pace of Growth

Retirement Housing Foundation (CA)



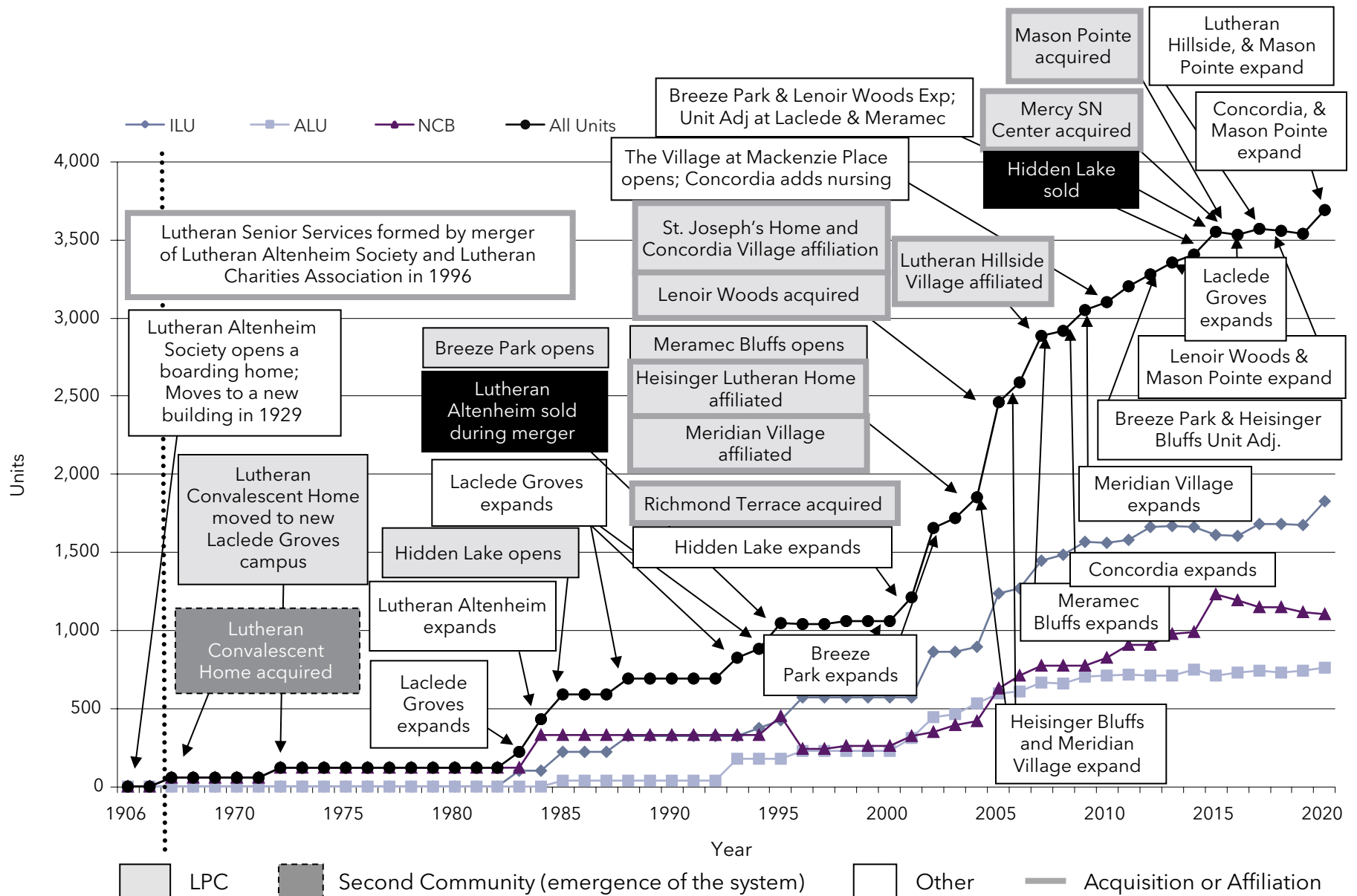
Growth: Pace of Growth

The Kendal Corporation (PA)



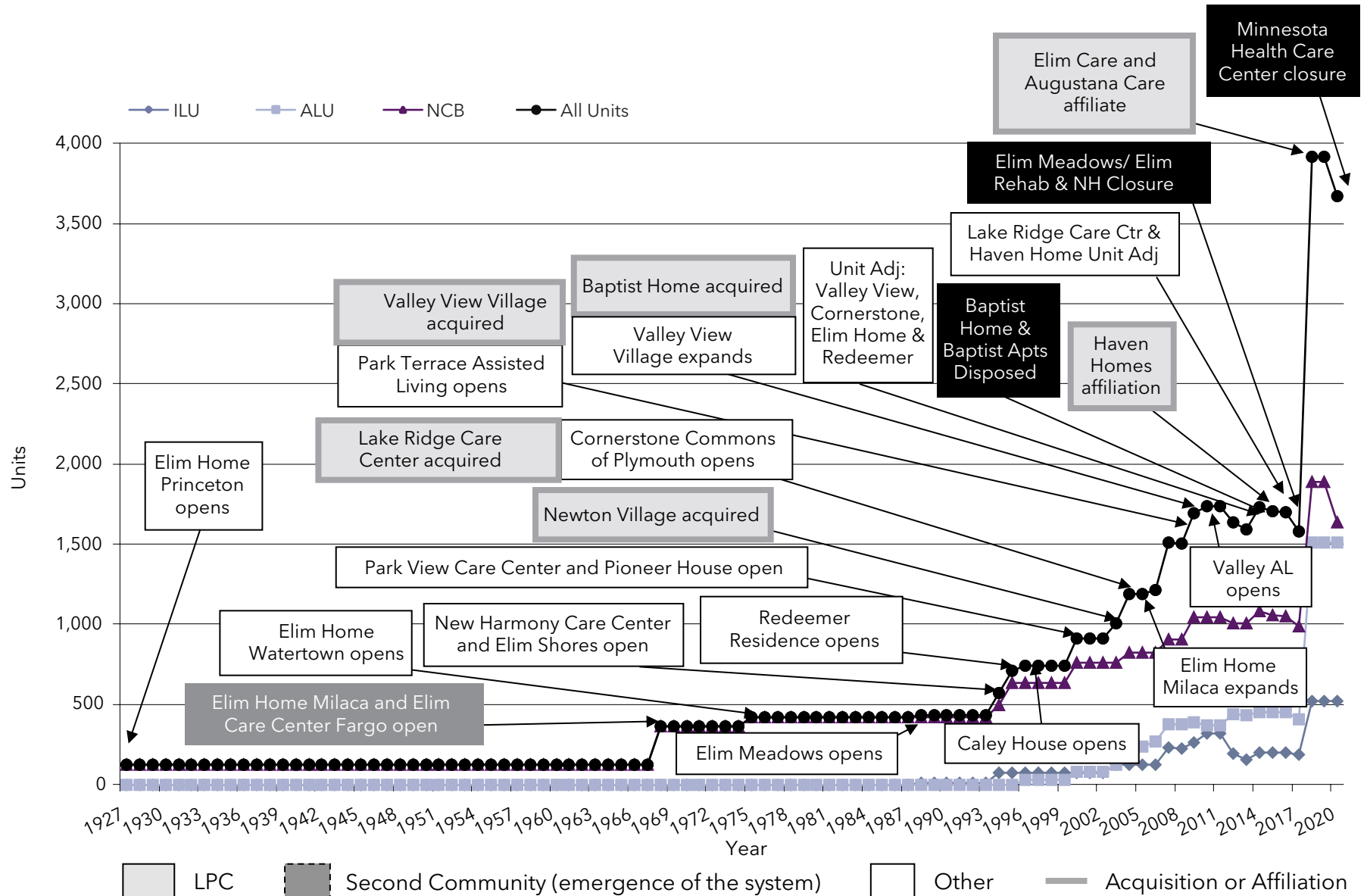
Growth: Pace of Growth

Lutheran Senior Services (MO)

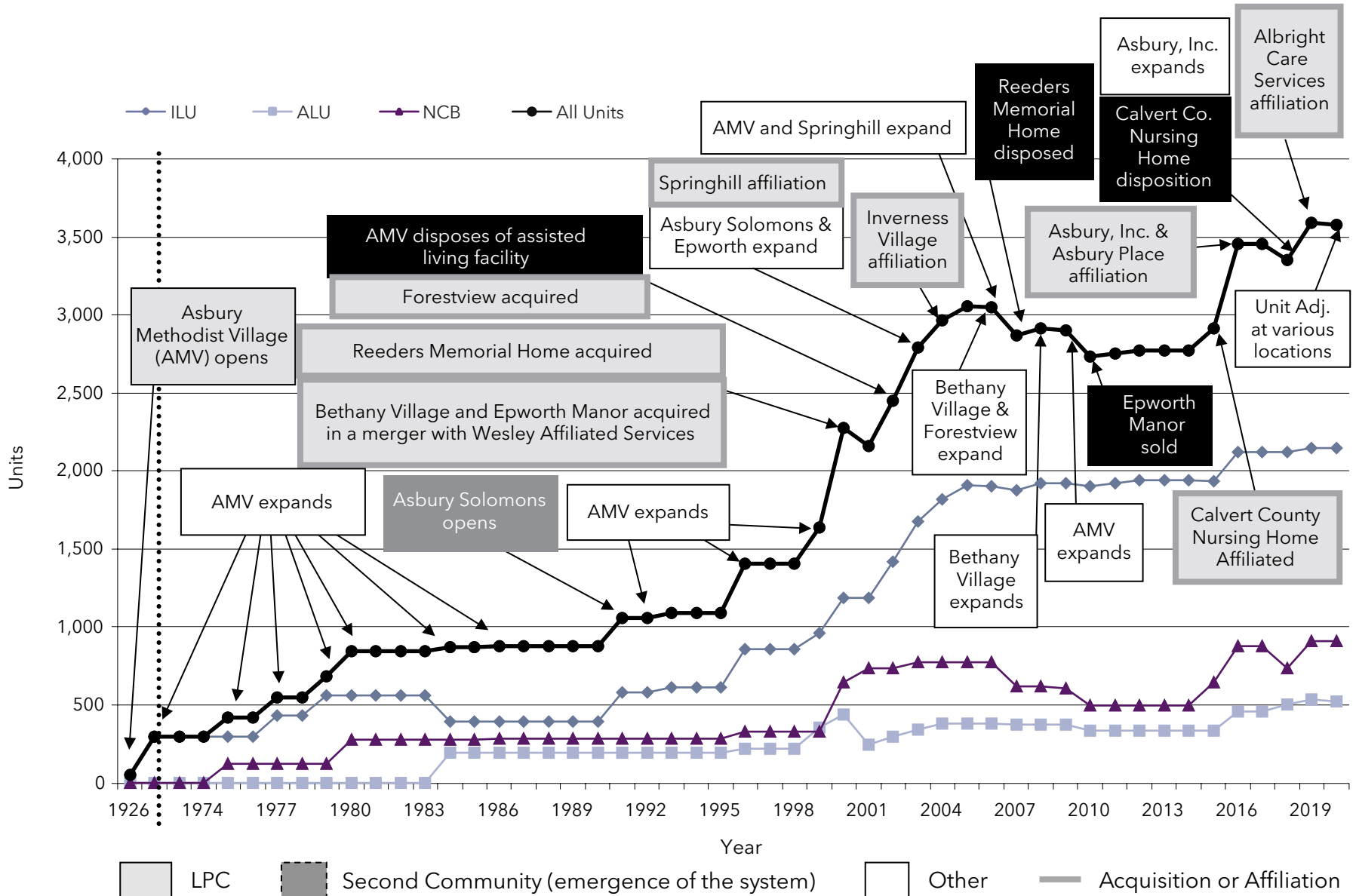


Growth: Pace of Growth

Cassia (MN)

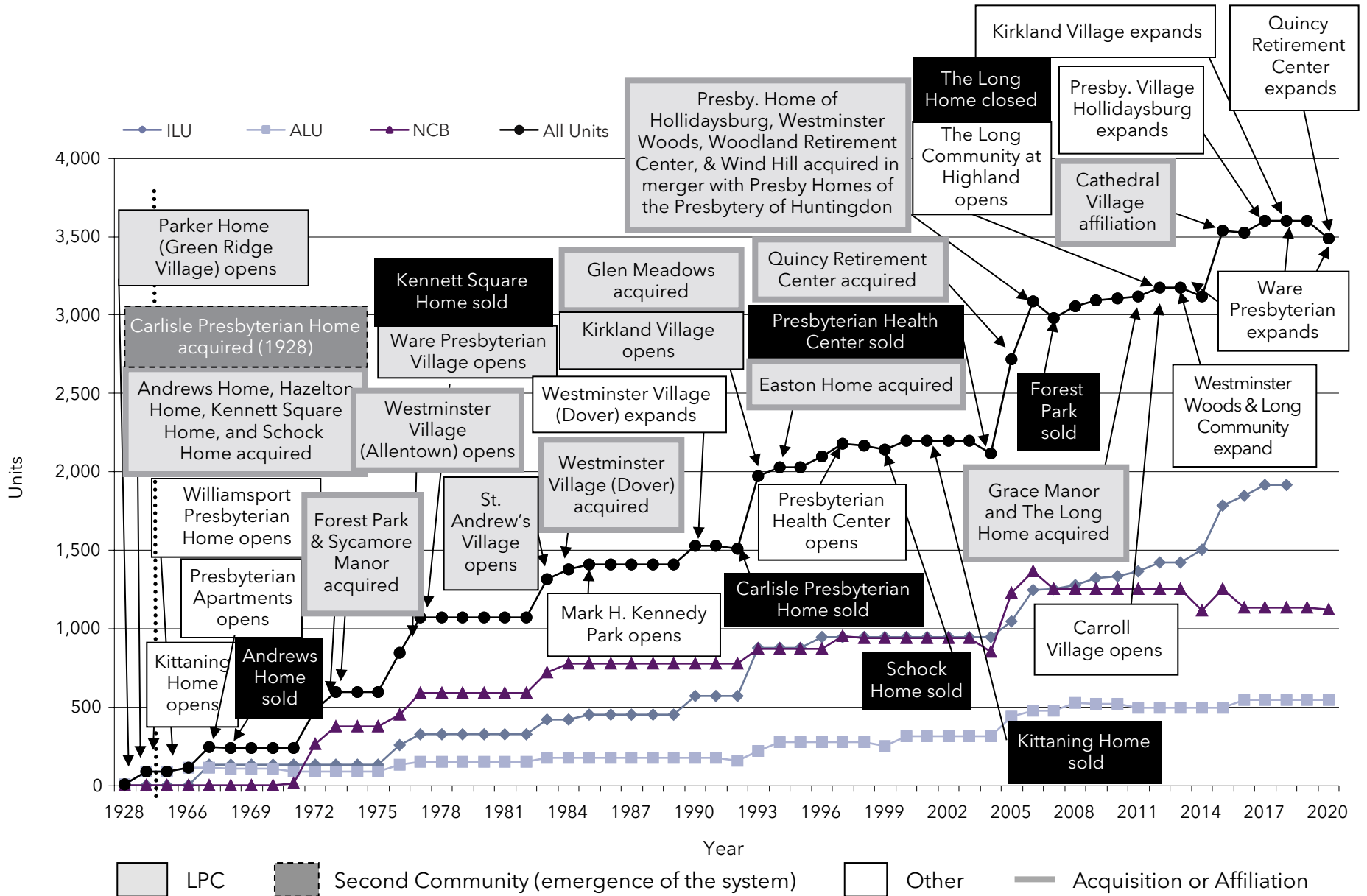


Growth: Pace of Growth Asbury Communities (MD)



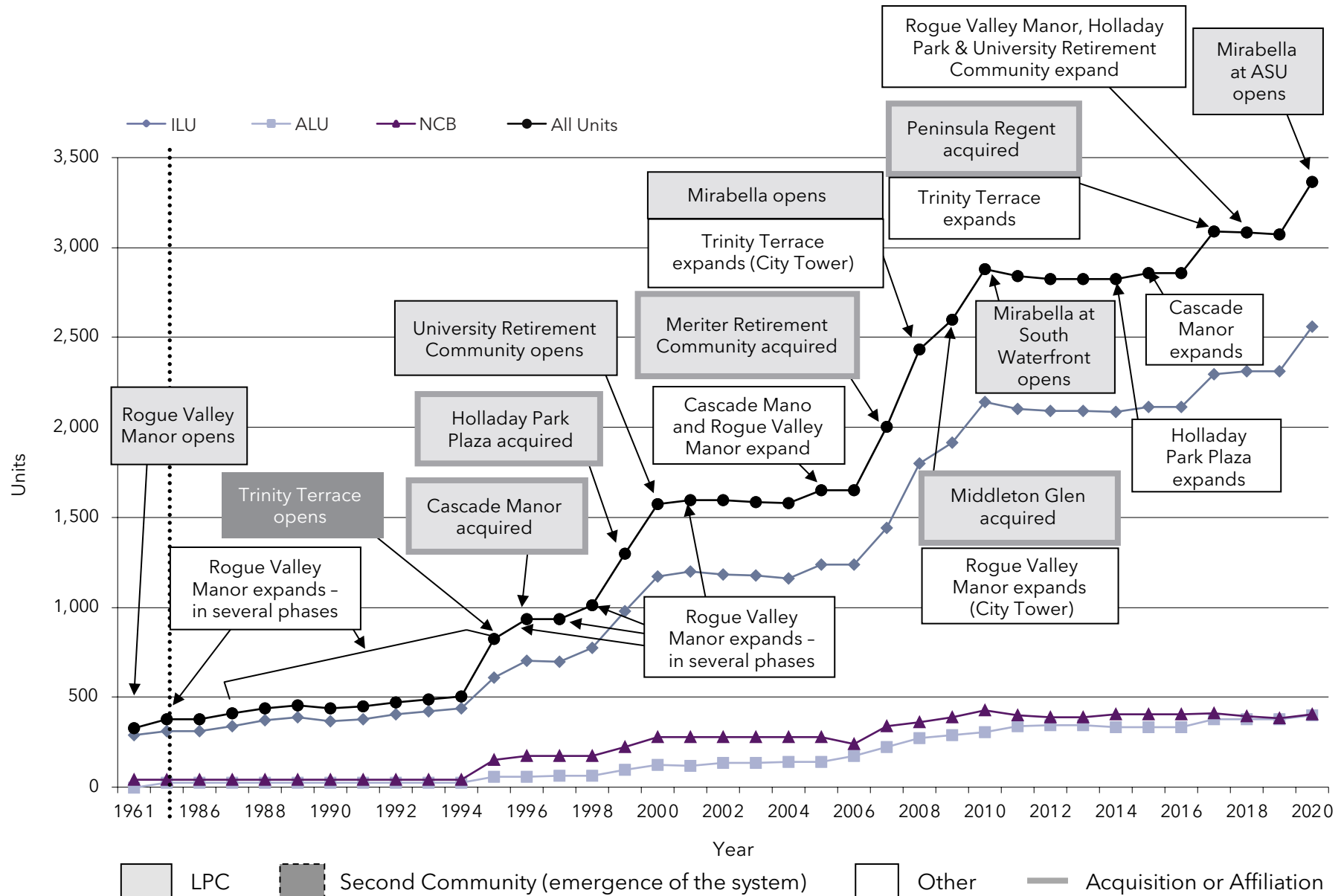
Growth: Pace of Growth

Presbyterian Senior Living (PA)



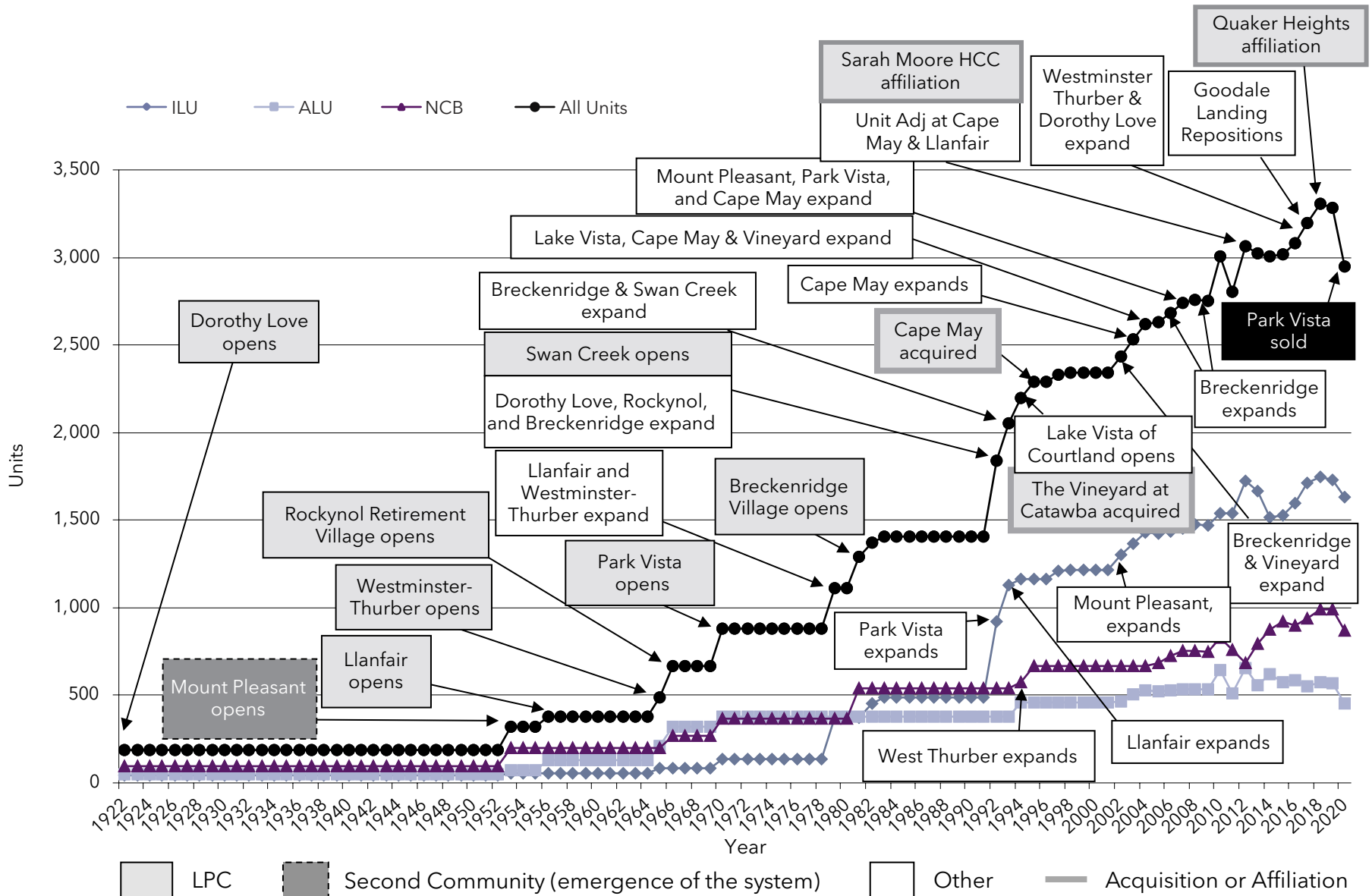
Growth: Pace of Growth

Pacific Retirement Services (OR)



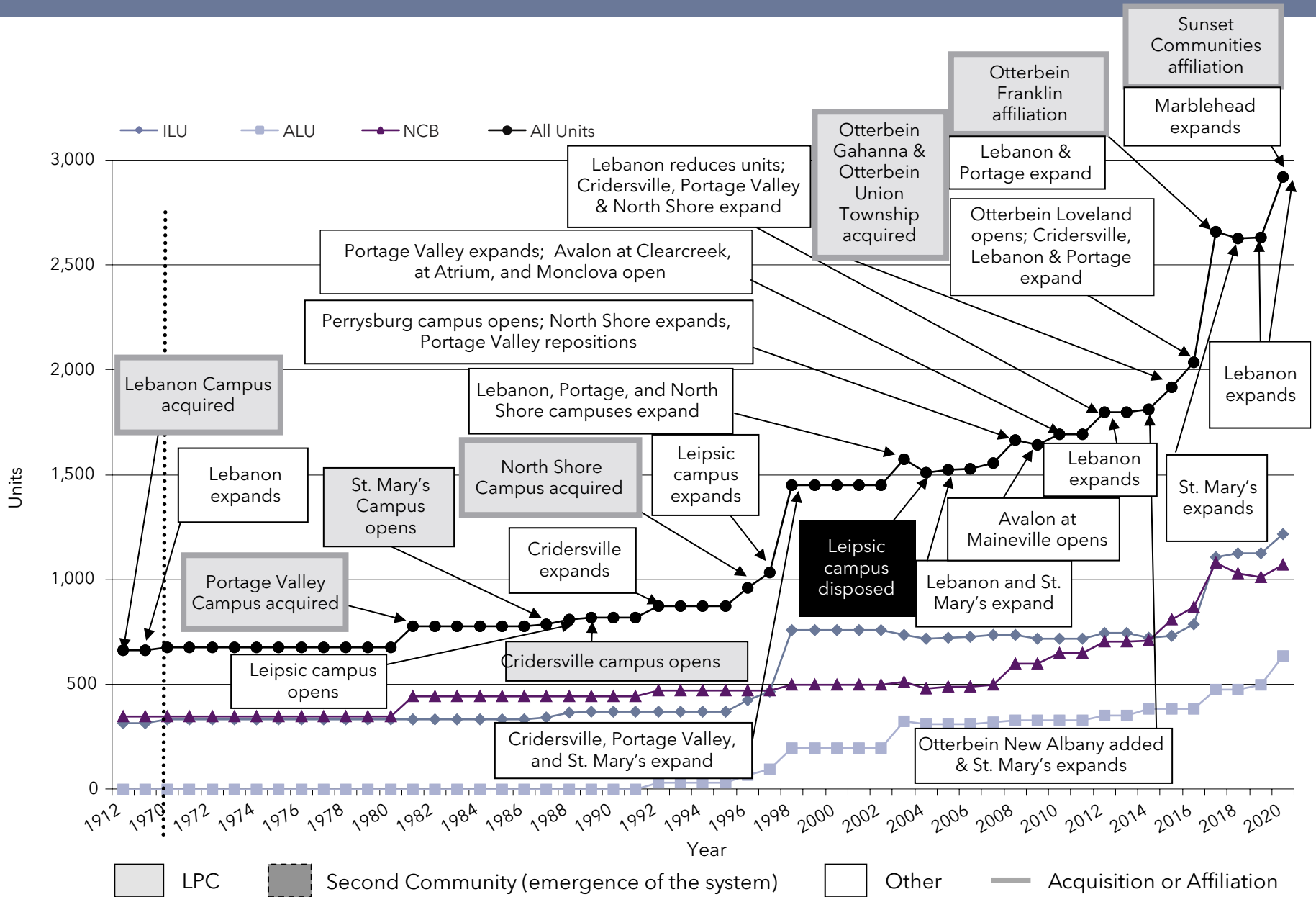
Growth: Pace of Growth

Ohio Living (OH)



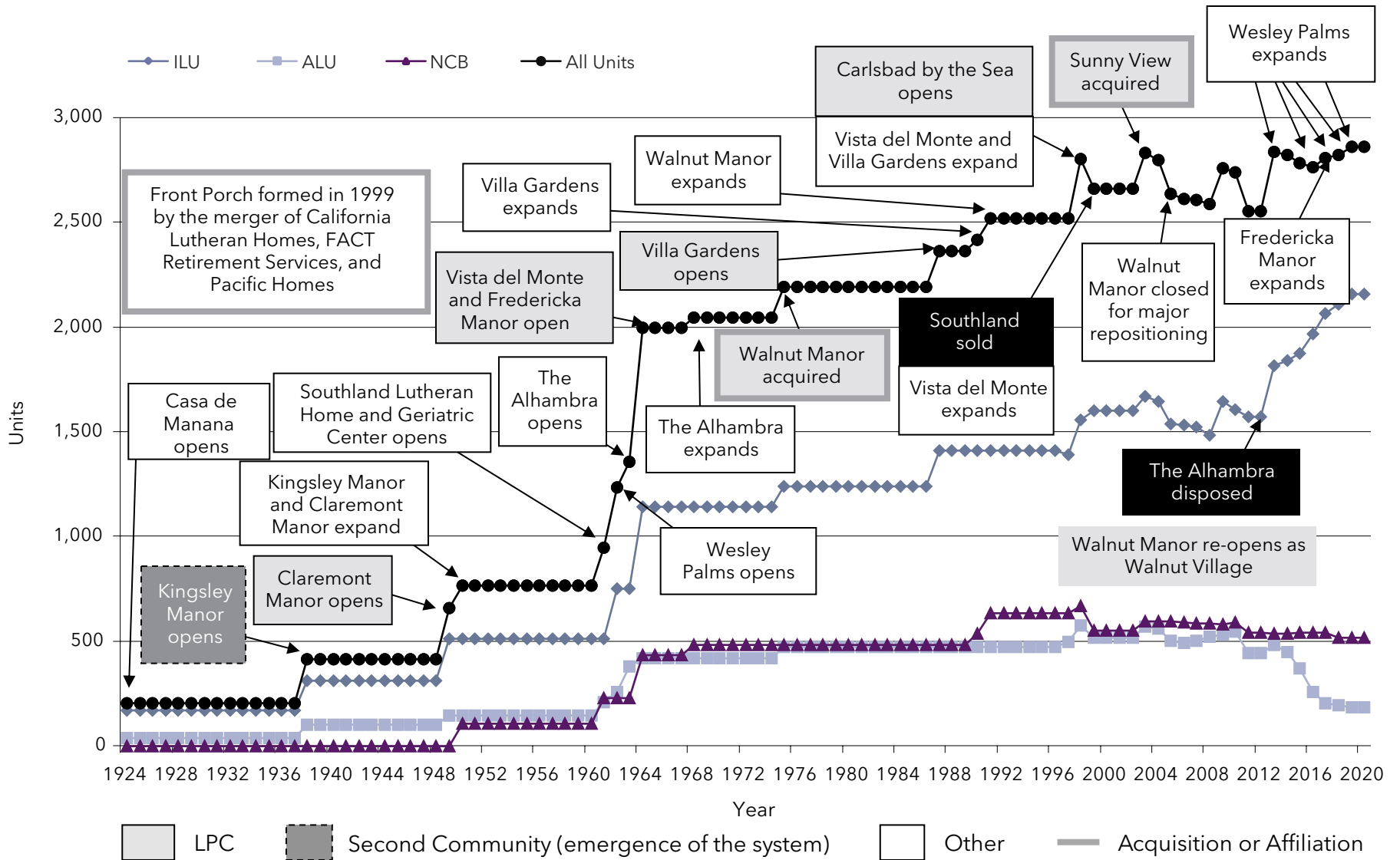
Growth: Pace of Growth

Otterbein SeniorLife (OH)



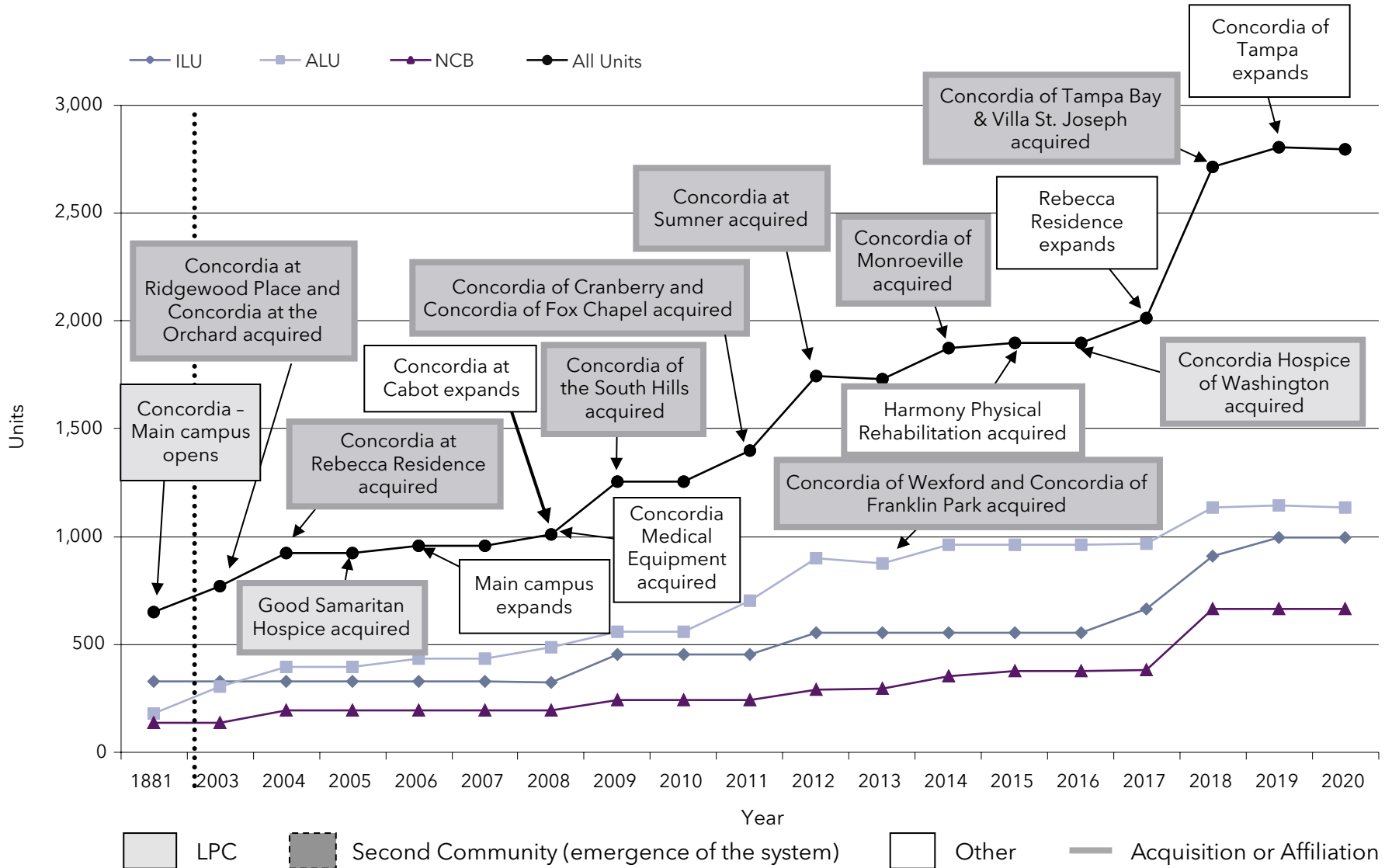
Growth: Pace of Growth

Front Porch Communities and Services (CA)



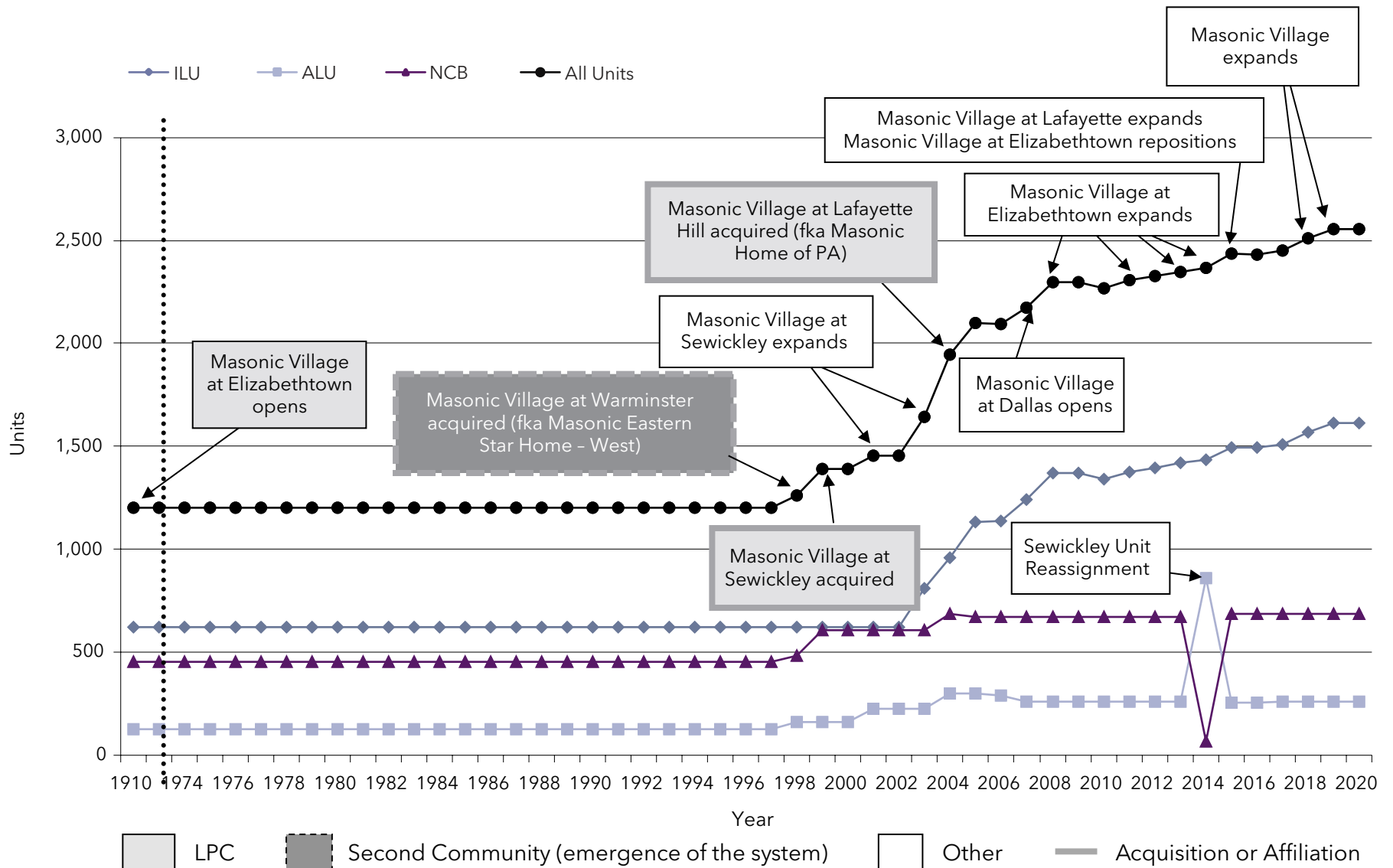
Growth: Pace of Growth

Concordia Lutheran Ministries (PA)



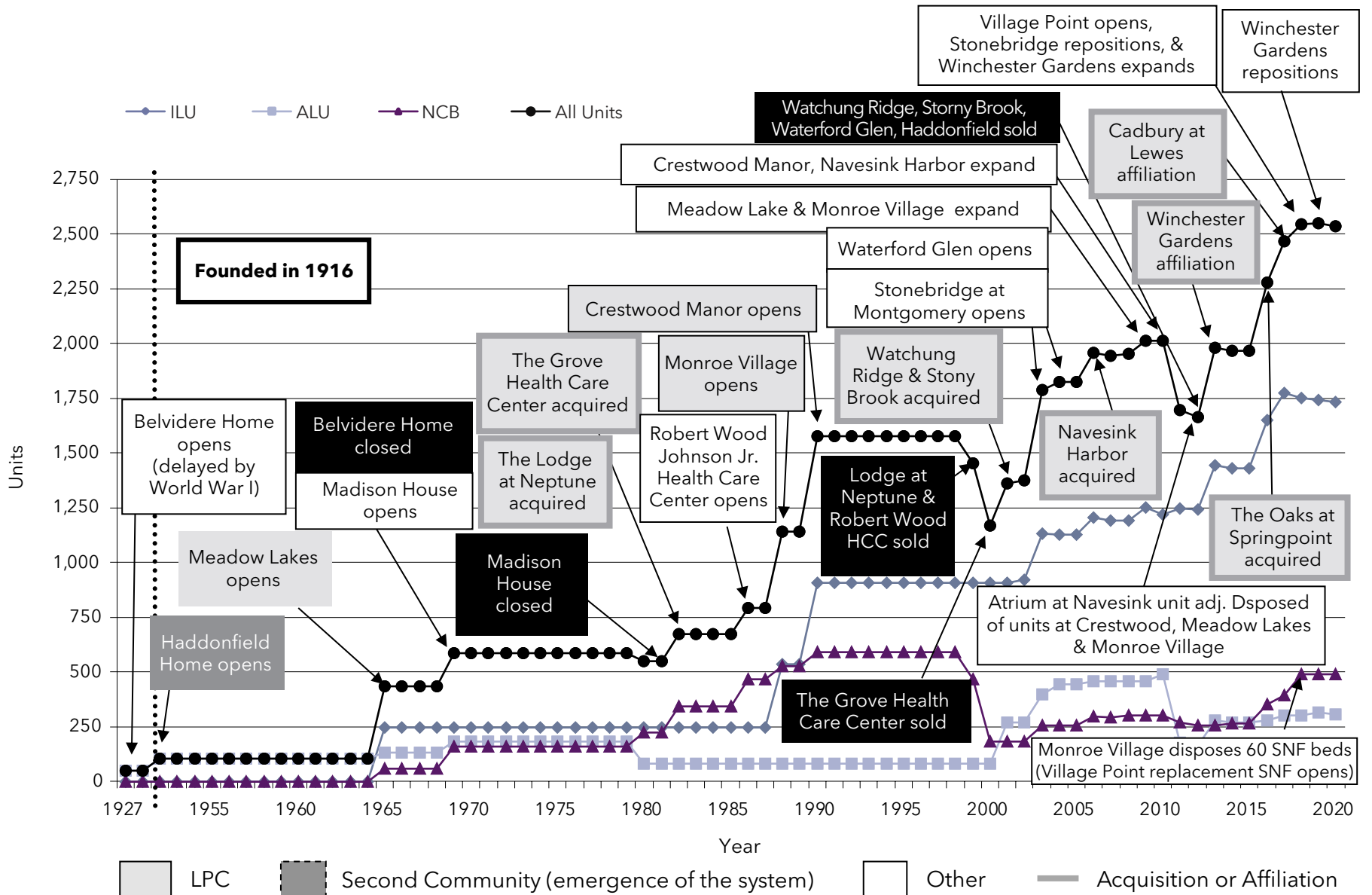
Growth: Pace of Growth

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 2019 and 2020, 2000 and 2020, and 1990 and 2020 (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

2021 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/20)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2020 (n=200)						
113	Presbyterian Homes of Georgia	GA	62.48%	38.45%	313	814
65	National Lutheran Communities & Services	MD	57.36%	36.45%	456	1,251
14	Lutheran Senior Services	MO	45.26%	31.16%	1,150	3,691
82	Life Enriching Communities	OH	31.57%	23.99%	256	1,067
27	Transforming Age	WA	31.33%	23.86%	579	2,427
Growth from 2000 to 2020 (n=178)						
1	National Senior Campuses	MA	712.23%	11.54%	2,624	21,313
148	Smith Senior Living	IL	591.30%	10.91%	92	636
27	Transforming Age	WA	568.60%	8.94%	363	2,427
61	SantaFe Senior Living	FL	342.71%	8.14%	295	1,306
23	Concordia Lutheran Ministries	PA	330.82%	8.01%	649	2,796
Growth from 1990 to 2020 (n=195)						
4	Presbyterian Homes and Services	MN	952.64%	8.08%	815	8,579
100	Givens Communities	NC	878.26%	7.78%	92	900
148	Smith Senior Living	IL	748.00%	7.19%	75	636
83	Lutheran Homes of South Carolina	SC	694.03%	6.91%	134	1,064
18	Pacific Retirement Services, Inc.	OR	636.11%	6.59%	457	3,364

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

** 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

2021 Rank	System Name	State	Growth*		Total Units (as of 12/31/20)
			Units Added	Average Annual Growth (%)	
Growth in 2020 (n=200)					
14	Lutheran Senior Services	MO	1,150	45.26%	3,691
4	Presbyterian Homes and Services	MN	621	7.80%	8,579
27	Transforming Age	WA	579	31.33%	2,427
65	National Lutheran Communities & Services	MD	456	57.36%	1,251
1	National Senior Campuses	MA	396	1.89%	21,313
Growth from 2000 to 2020 (n=178)					
1	National Senior Campuses	MA	18,689	712.23%	21,313
4	Presbyterian Homes and Services	MN	5,898	219.99%	8,579
2	Evangelical Lutheran Good Samaritan Society	SD	4,700	43.49%	15,507
3	ACTS Retirement-Life Communities, Inc.	PA	3,814	66.34%	9,563
6	HumanGood	CA	2,817	104.88%	5,503
Growth from 1990 to 2020 (n=194)					
1	National Senior Campuses	MA	n/a**	n/a**	21,313
4	Presbyterian Homes and Services	MN	7,764	952.64%	8,579
2	Evangelical Lutheran Good Samaritan Society	SD	5,722	58.48%	15,507
3	ACTS Retirement-Life Communities, Inc.	PA	4,632	93.94%	9,563
6	HumanGood	CA	3,482	172.29%	5,503

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

** 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)

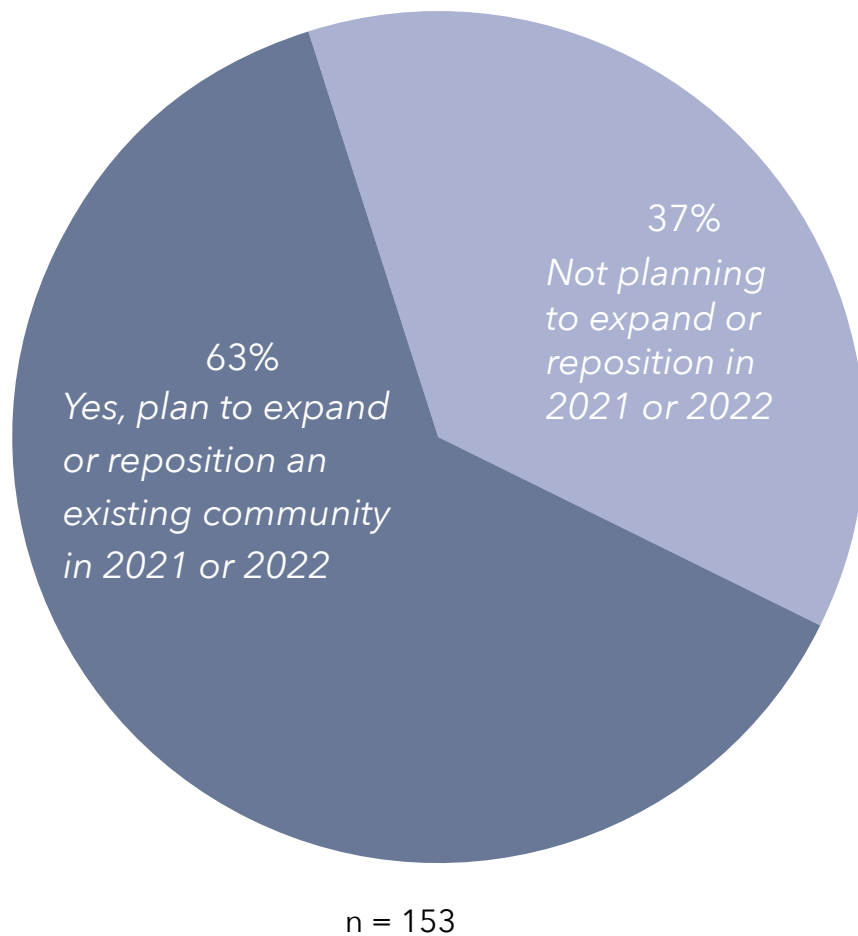
2021 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/20)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2020 (n=34)						
14	Lutheran Senior Services	MO	45.26%	45.26%	1,150	3,691
27	Transforming Age	WA	31.33%	31.33%	579	2,427
20	Otterbein SeniorLife	OH	11.06%	11.06%	291	2,921
18	Pacific Retirement Services	OR	9.47%	9.47%	291	3,364
4	Presbyterian Homes and Services	MN	7.80%	7.80%	621	8,579
Growth from 2000 to 2020 (n=34)						
1	National Senior Campuses	MA	712.23%	11.54%	18,689	21,313
27	Transforming Age	WA	568.60%	8.94%	2,064	2,427
23	Concordia Lutheran Ministries	PA	330.82%	8.01%	2,147	2,796
14	Lutheran Senior Services	MO	248.21%	4.71%	2,631	3,691
4	Presbyterian Homes and Services	MN	219.99%	5.89%	5,898	8,579
Growth from 1990 to 2020 (n=34)						
4	Presbyterian Homes and Services	MN	952.64%	8.08%	7,764	8,579
18	Pacific Retirement Services	OR	636.11%	6.59%	2,907	3,364
27	Transforming Age	WA	442.95%	5.27%	1,980	2,427
14	Lutheran Senior Services	MO	434.15%	5.19%	3,000	3,691
13	The Kendal Corporation	PA	390.44%	4.81%	2,940	3,693

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

** 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

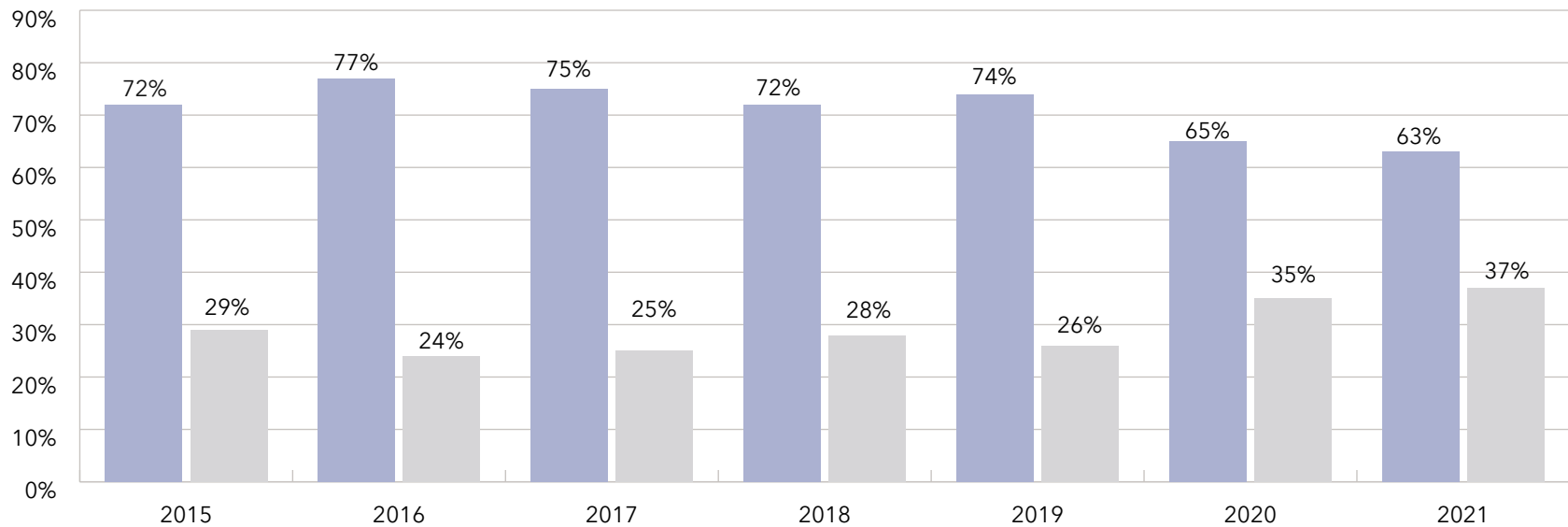


Future Growth Plans

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 63% of the LZ 200 reported intentions to expand or reposition an existing campus in 2020 or 2021. Roughly 27% reported that they intend to grow via the construction of new communities while 24% responded 'maybe' to this type of growth in 2021 or 2022. Another 13% reported that they intend to grow from affiliation while 29% may consider affiliation in 2021 or 2022.

Growth: Future Growth Plans

Percentage Planned Expansions or Relocations Since 2015



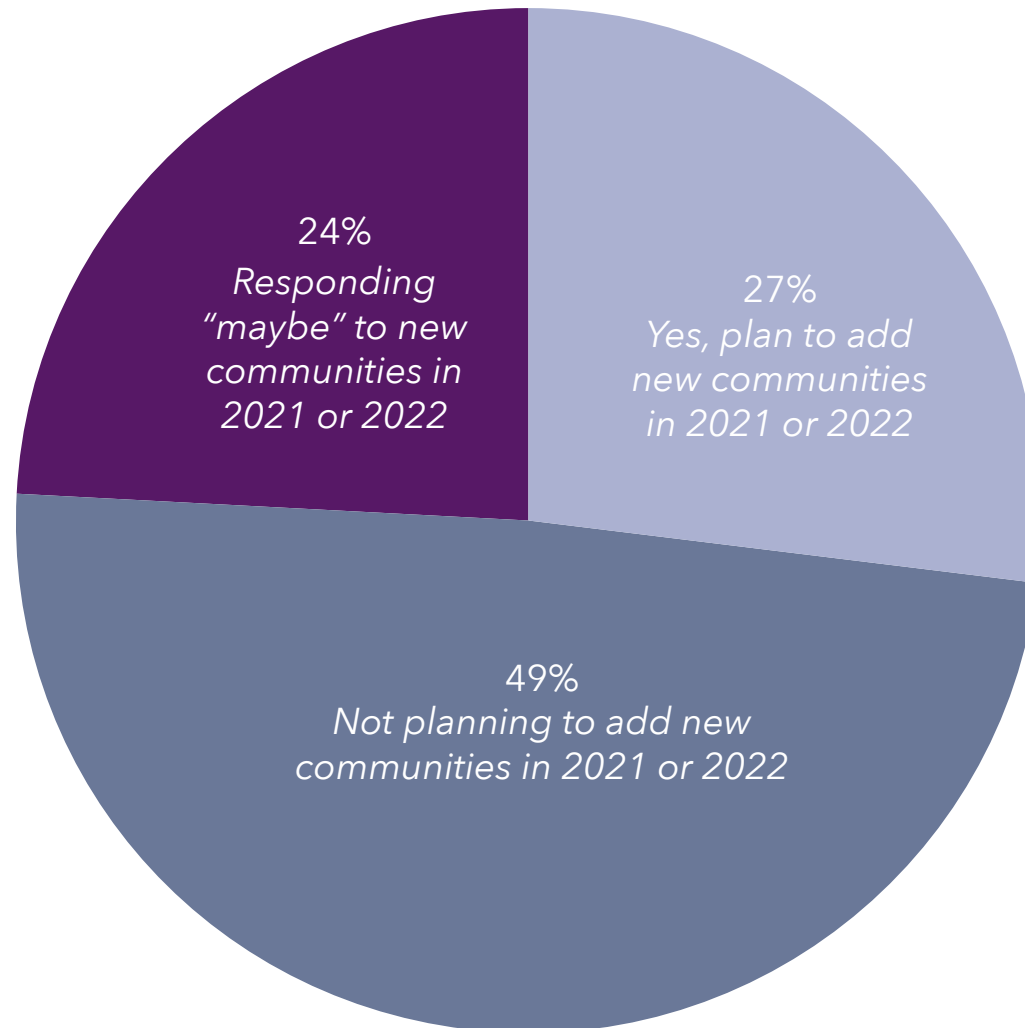
KEY: ■ Yes, plan to expand or reposition an existing community

■ Not planning to expand or reposition

n = 153

Growth: Future Growth Plans

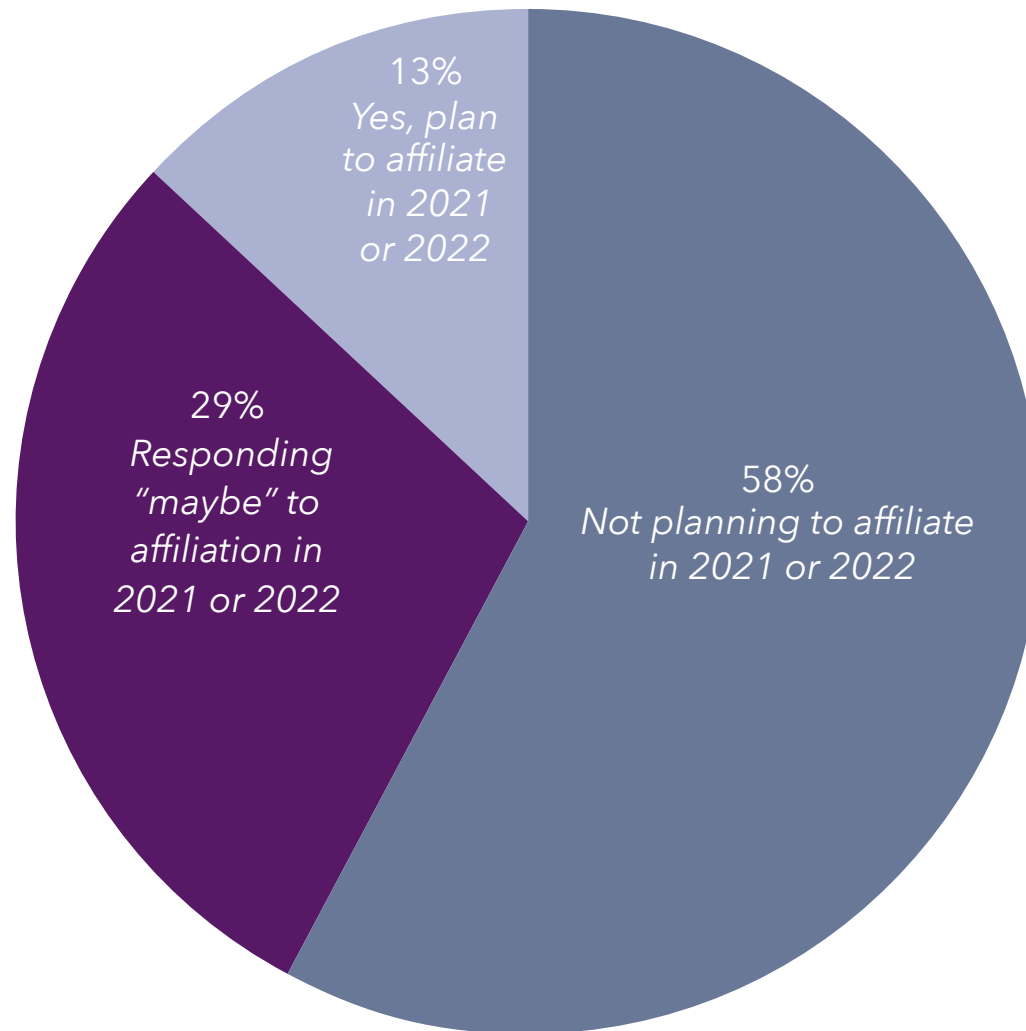
Percentage Planning to Add A New Community Through Development or Affiliation



N= 153

Growth: Future Growth Plans

Percentage Planning to Grow Through Affiliation



N= 153

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 the largest 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.

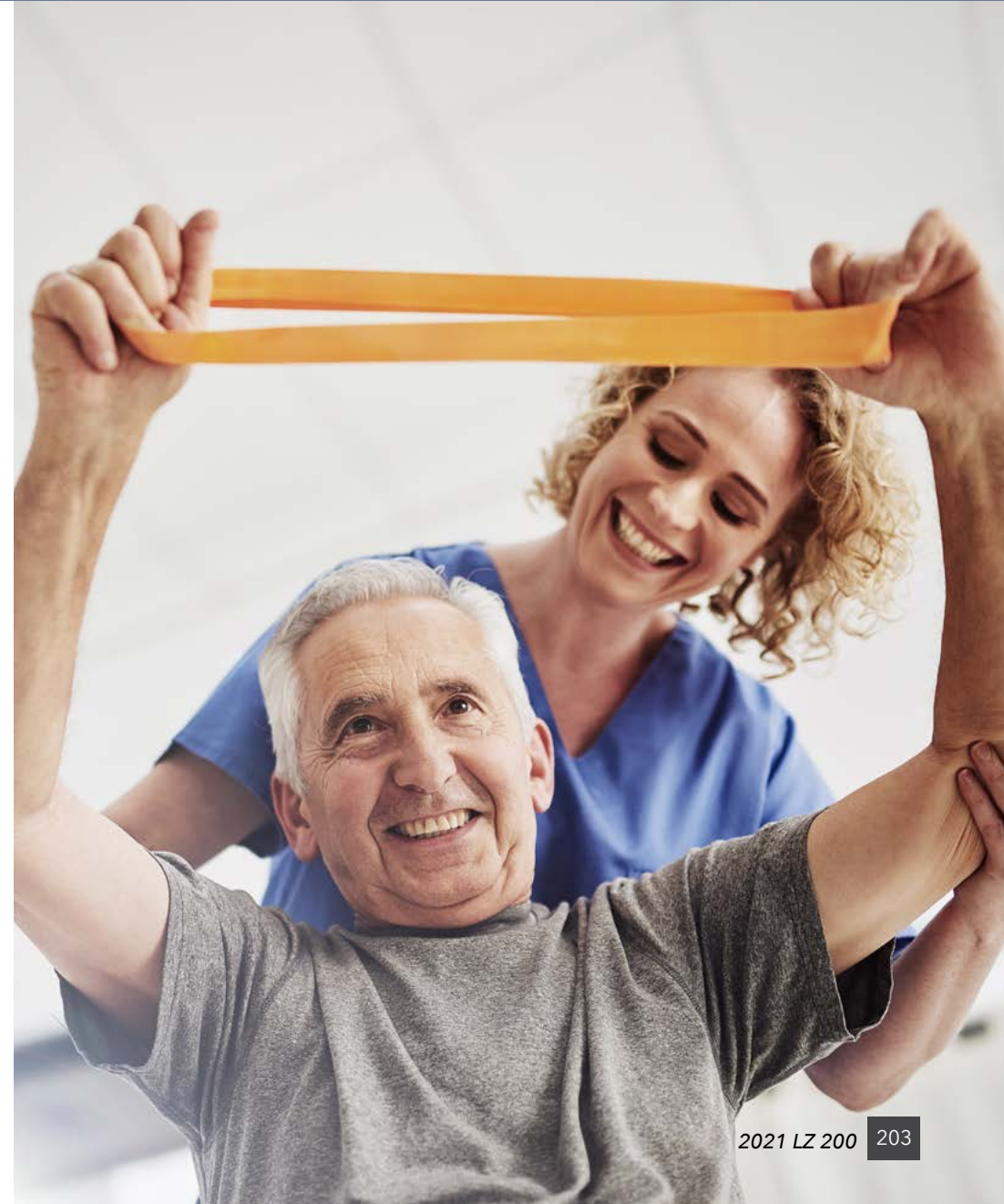
Type of Growth: Expansion, New Communities, Merger/Acquisition/Affiliation, Disposition

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 (1980-2020). More than 1,350 communities have been added from campus expansion since 1980 (Chart 5-6a). Dispositions have also increased dramatically. Of the 236 community dispositions that occurred from 1980-2020 among the LZ 200 (Chart 5-6a), roughly 220 of these dispositions occurred in approximately the last decade (Chart 5-6c). The most common dispositions in recent years have been free-standing nursing homes or assisted living and financially distressed Life Plan Communities.

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

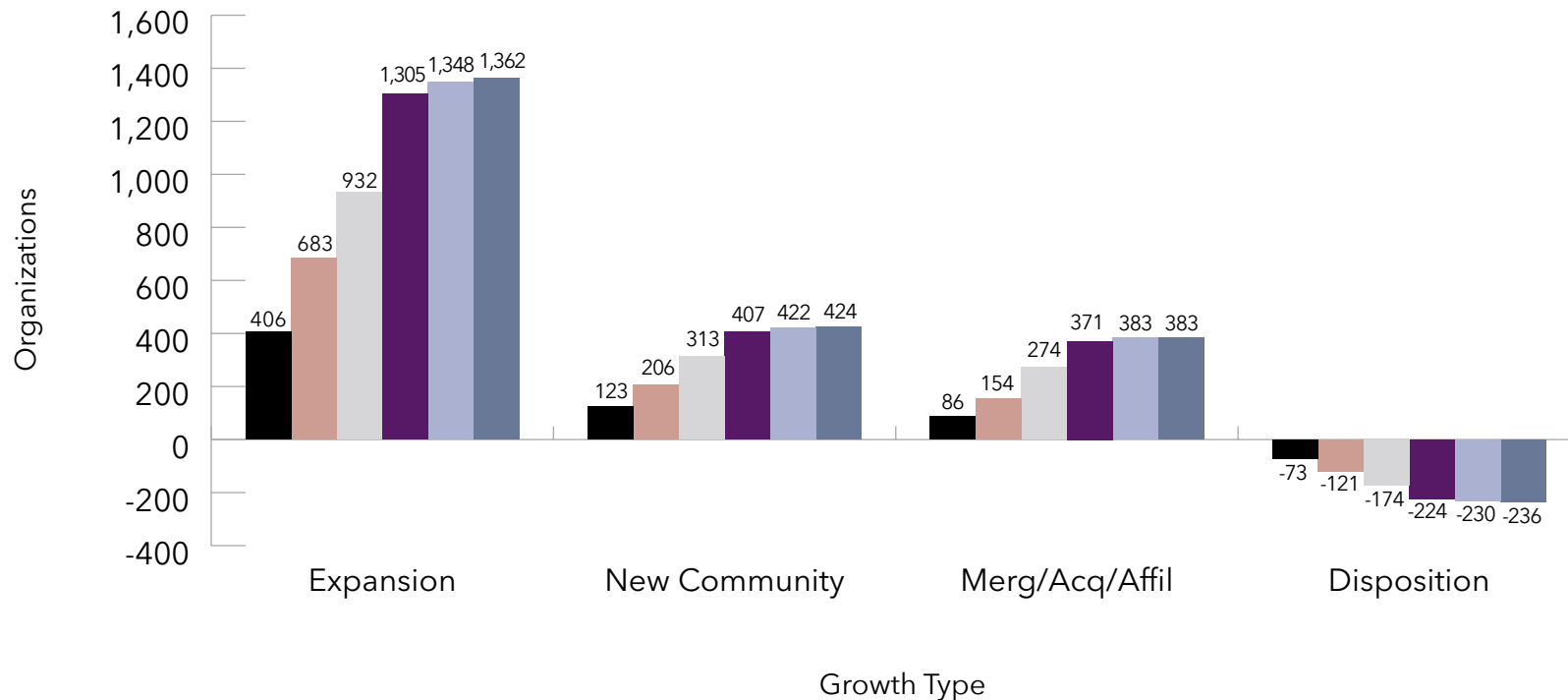
Growth: Type of Growth by Organizations

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 2020



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.

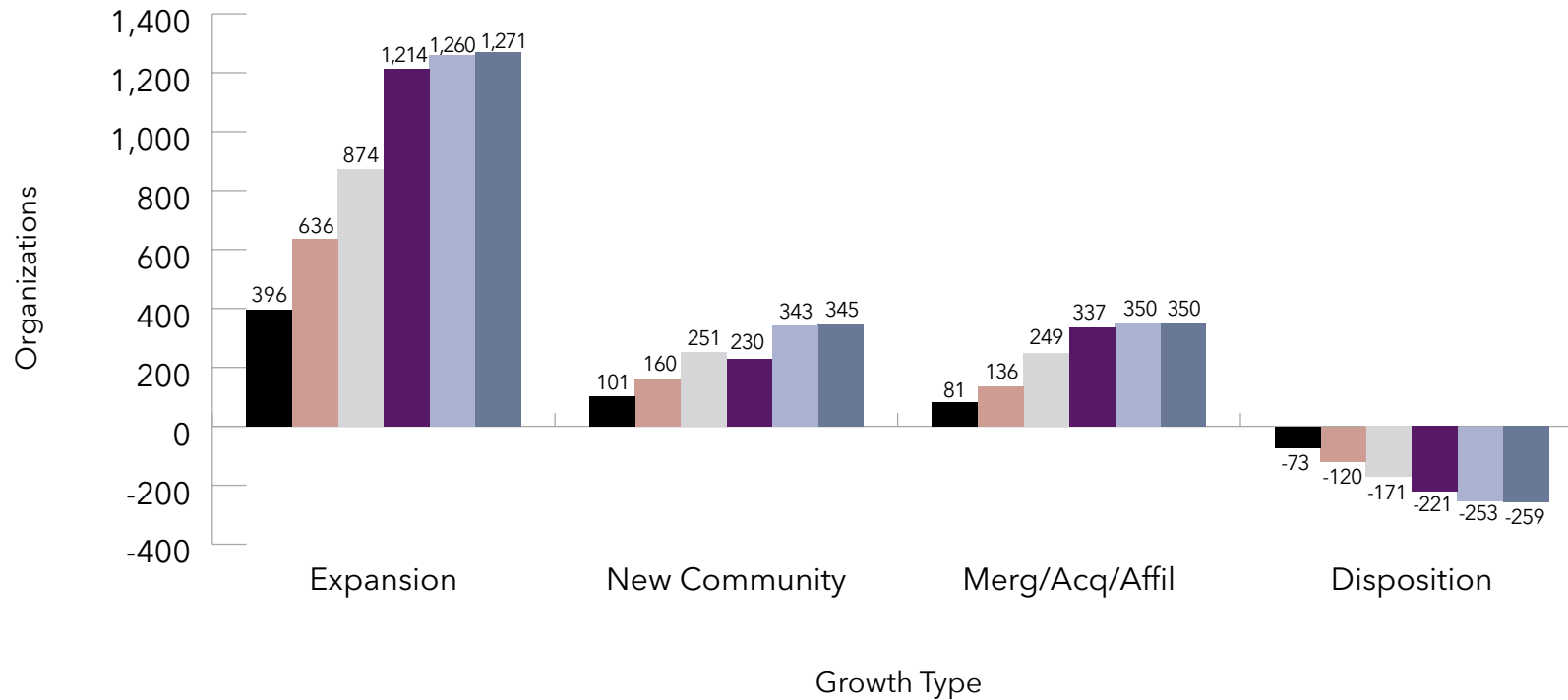
New Community: Growth by the addition of units through construction of a new location.

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 2020



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.

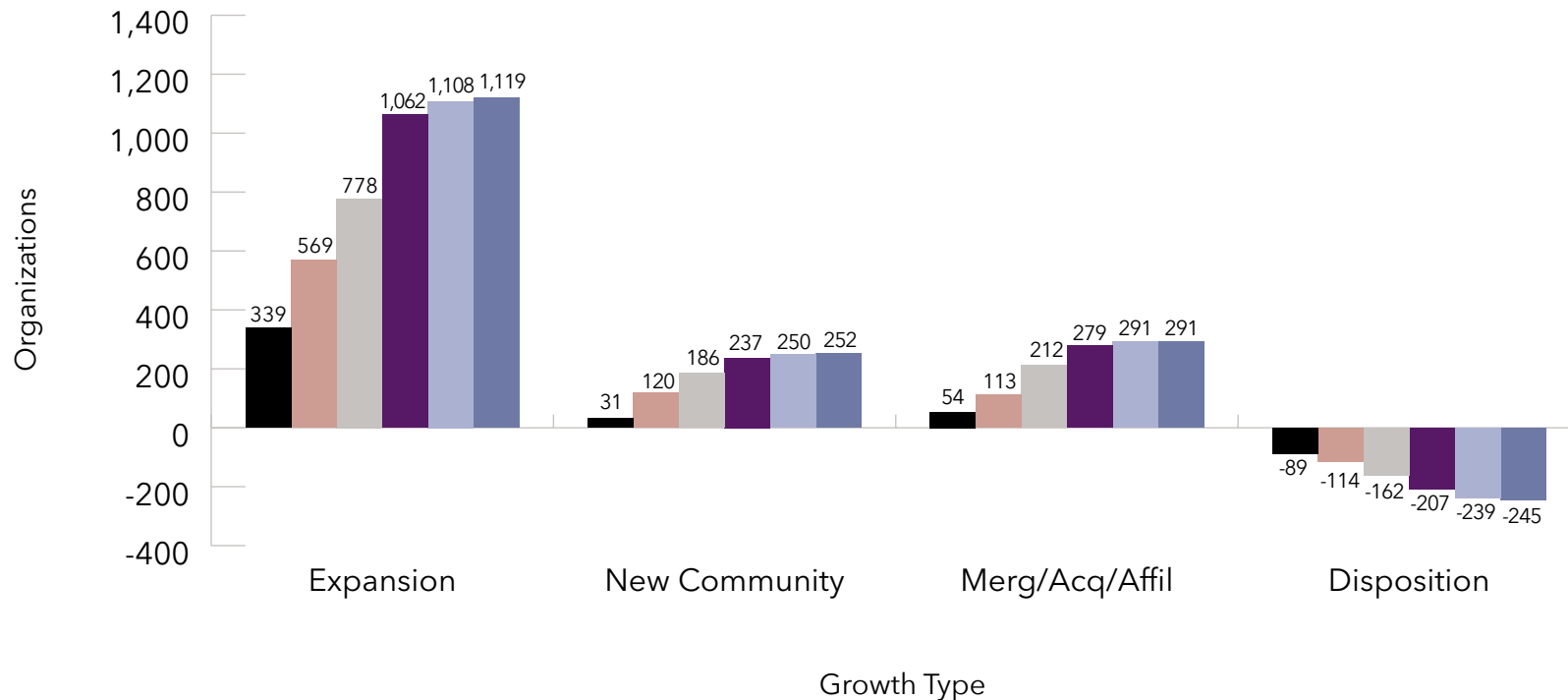
New Community: Growth by the addition of units through construction of a new location.

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 2020



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.

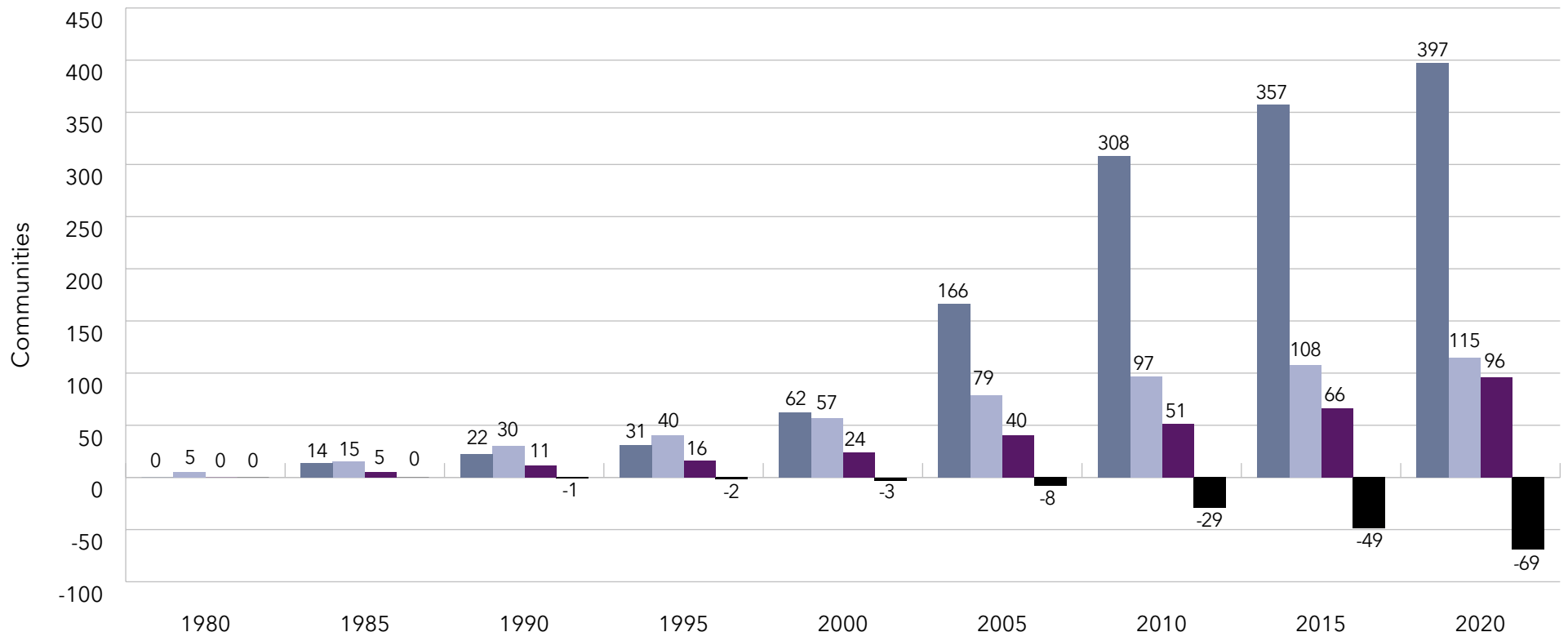
New Community: Growth by the addition of units through construction of a new location.

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 (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.

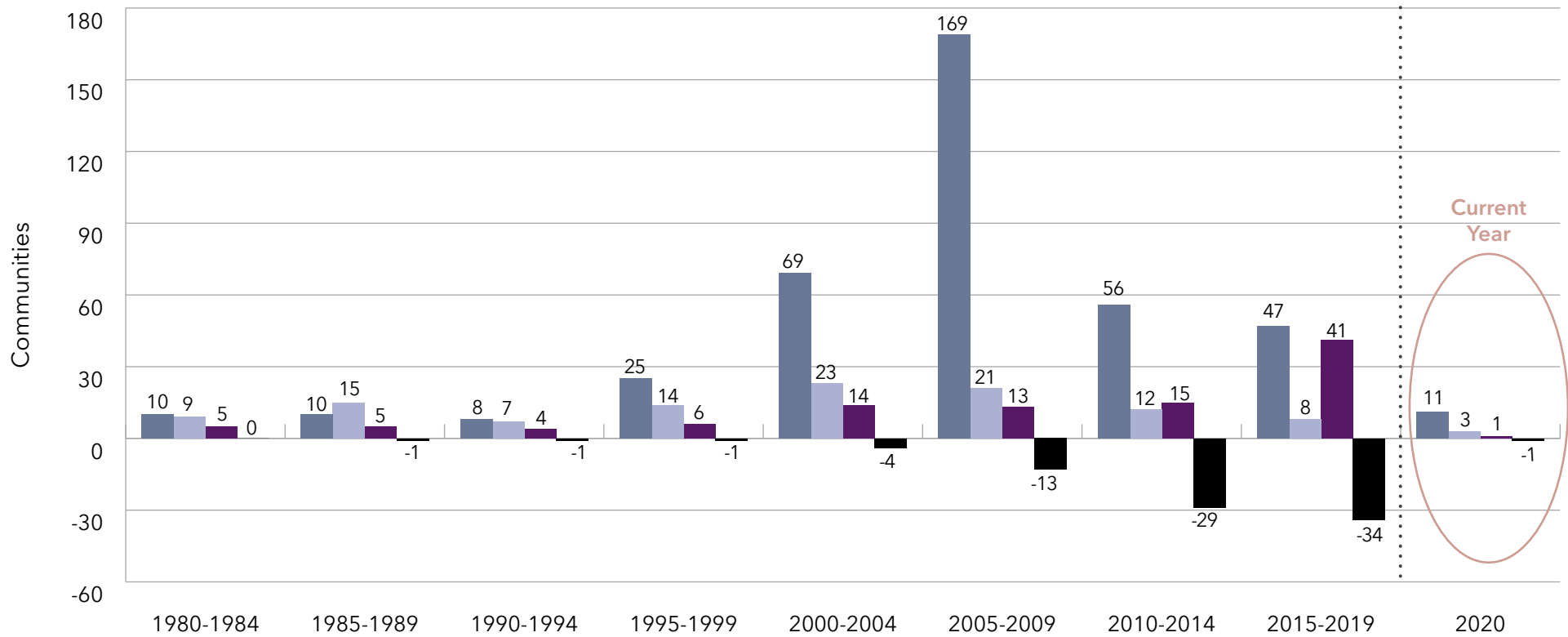
New Community: Growth by the addition of units through construction of a new location.

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

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.

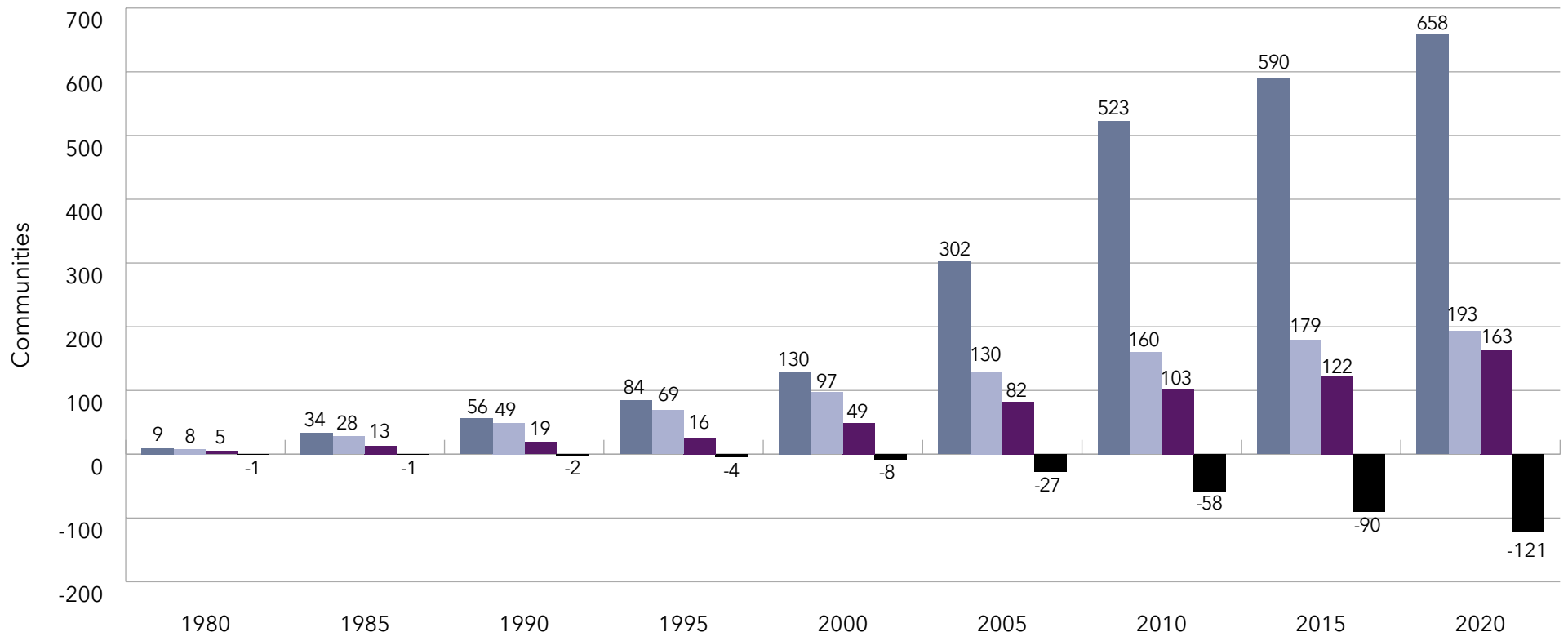
New Community: Growth by the addition of units through construction of a new location.

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



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.

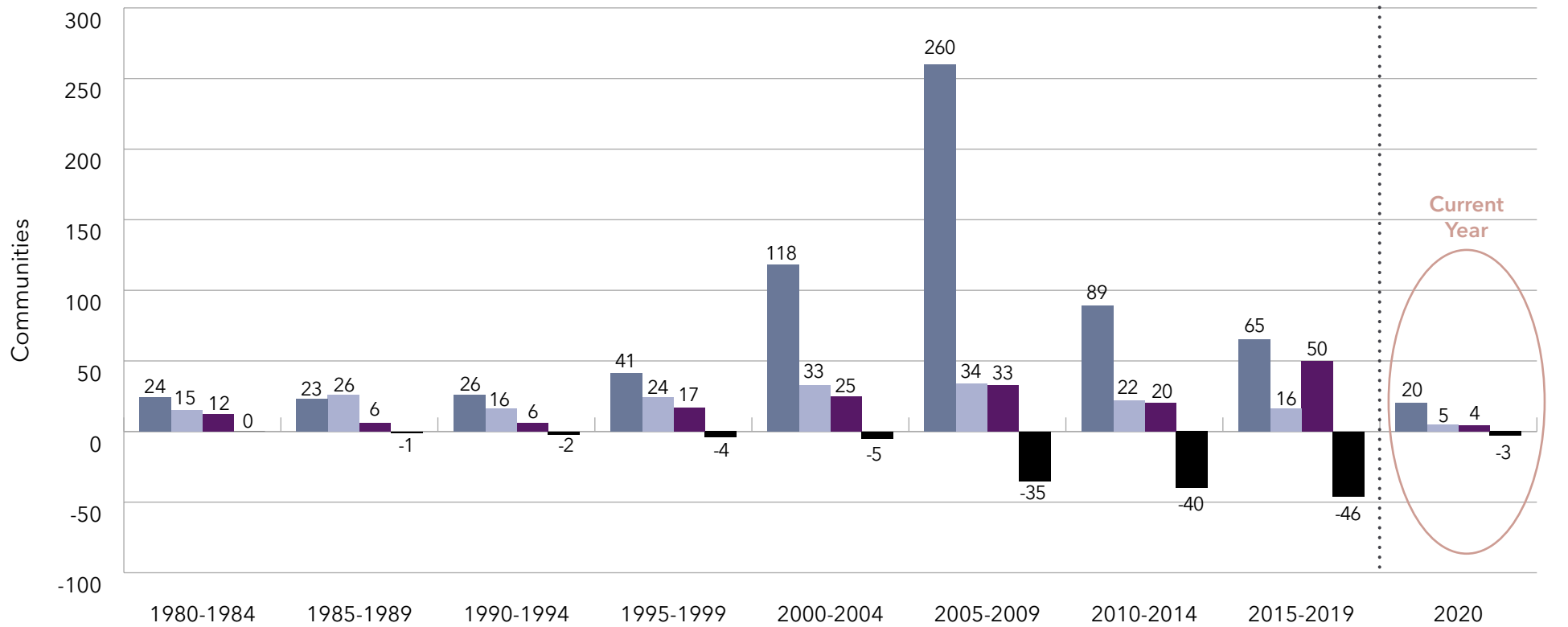
New Community: Growth by the addition of units through construction of a new location.

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

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.

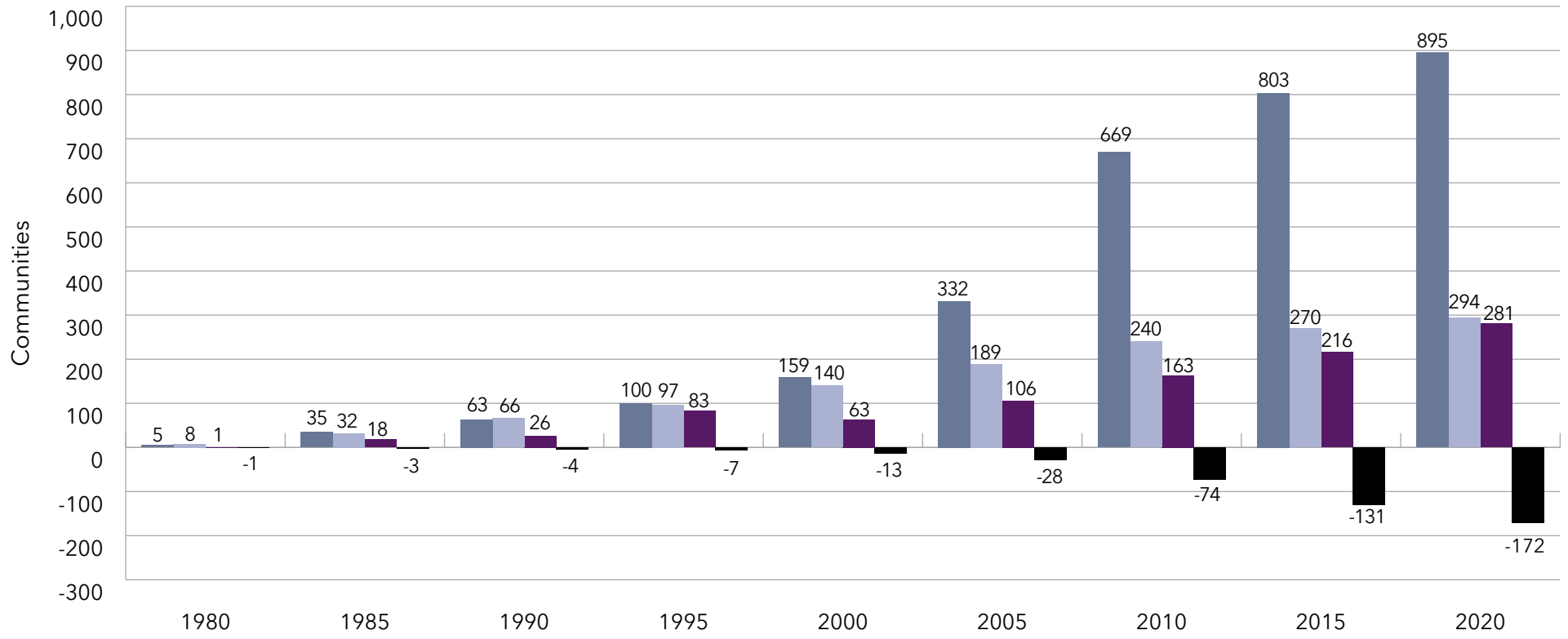
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

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 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.

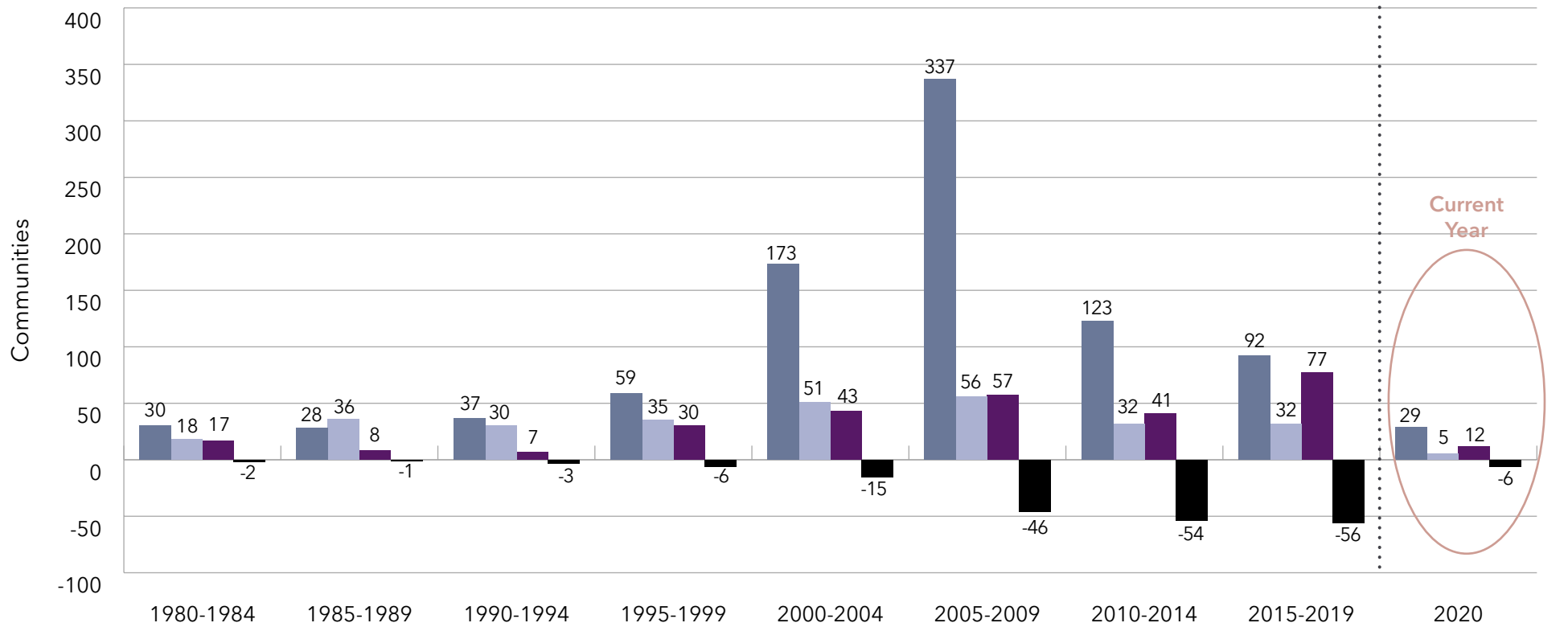
New Community: Growth by the addition of units through construction of a new location.

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
- 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.

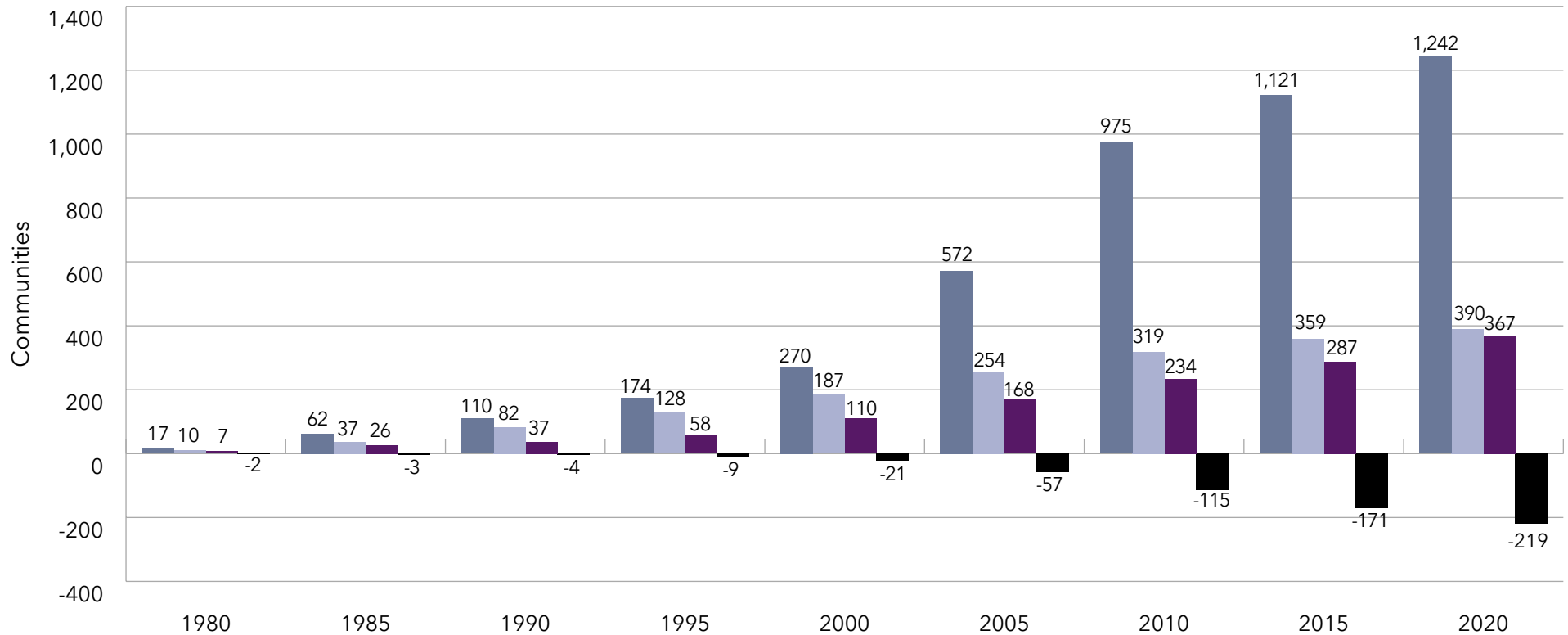
New Community: Growth by the addition of units through construction of a new location.

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

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.

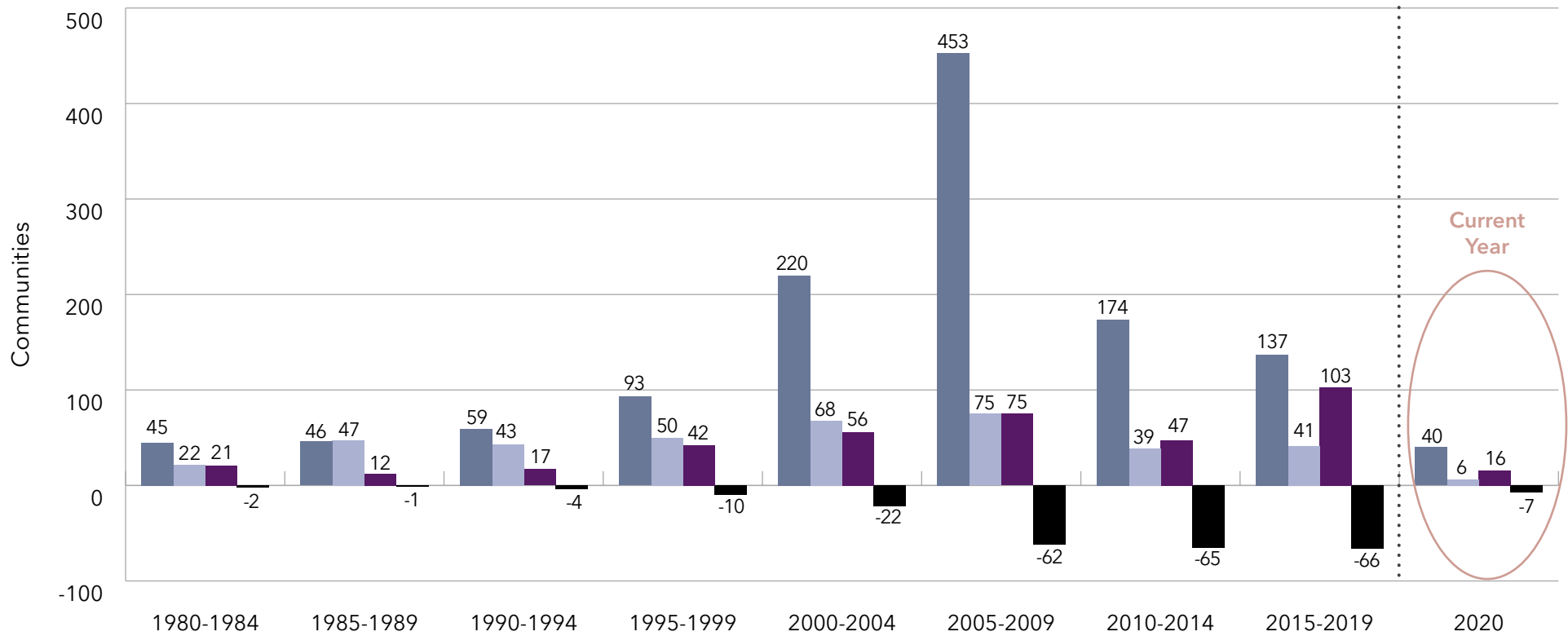
New Community: Growth by the addition of units through construction of a new location.

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.

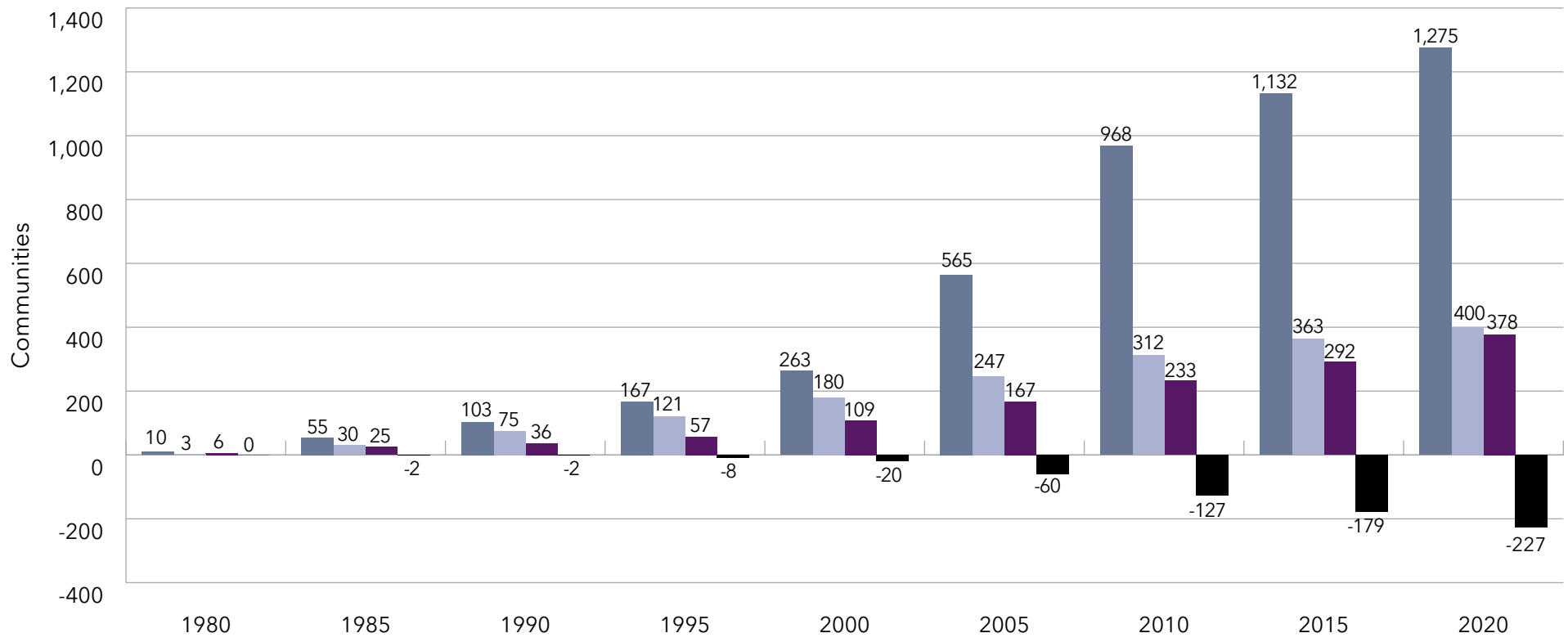
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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.

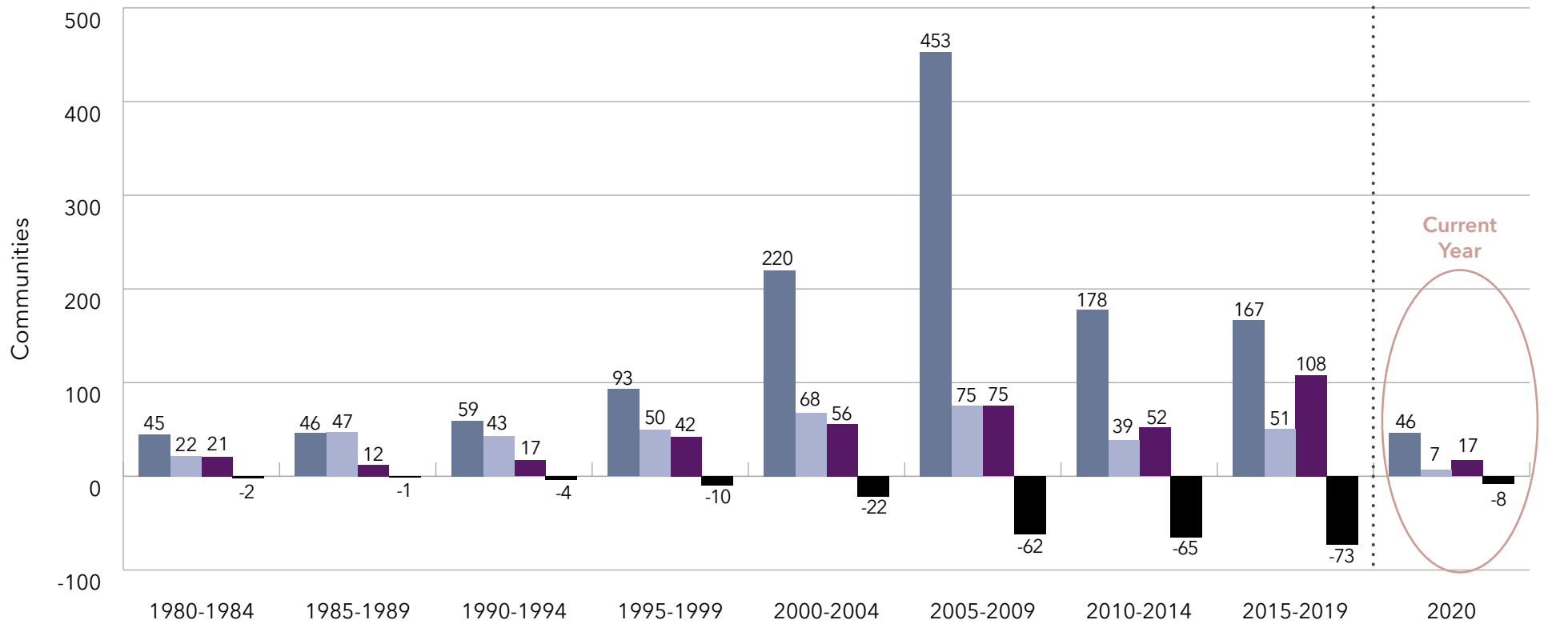
Note: Expansion to largest 150 made in 2015

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.

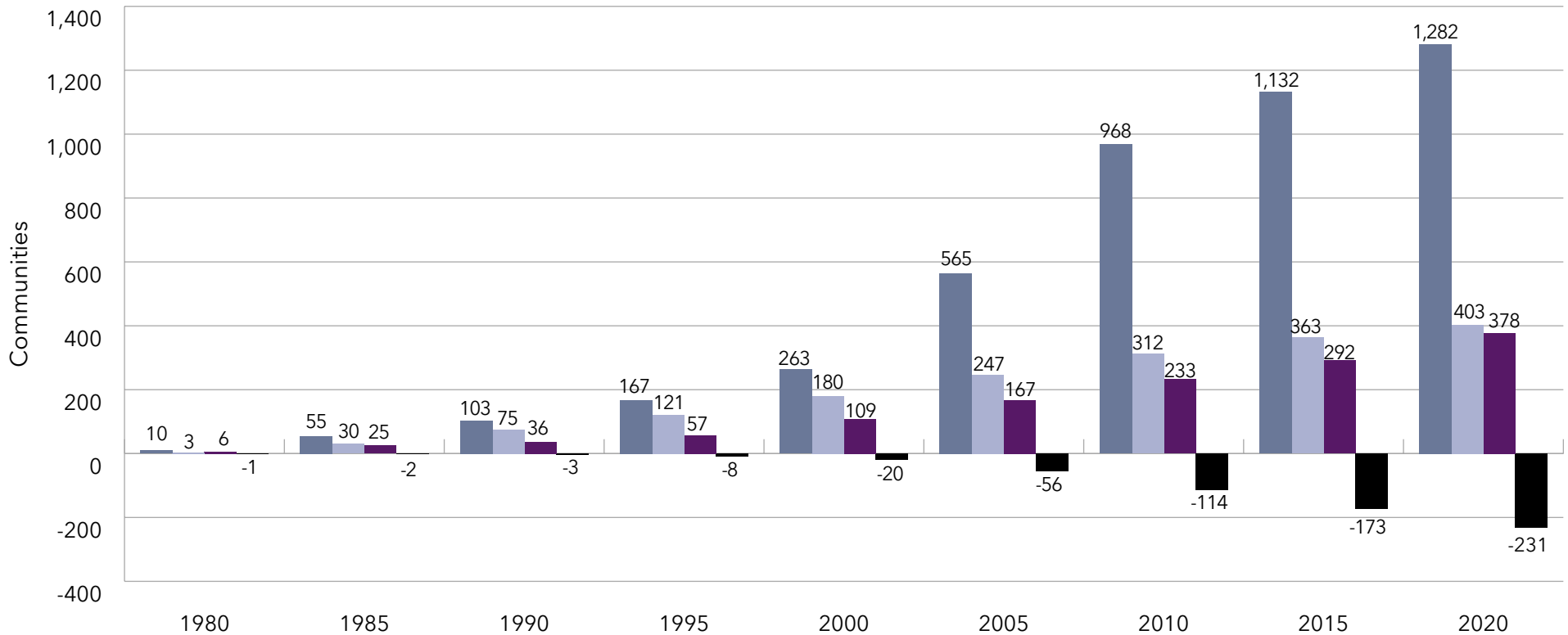
Note: Expansion to largest 150 made in 2015

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

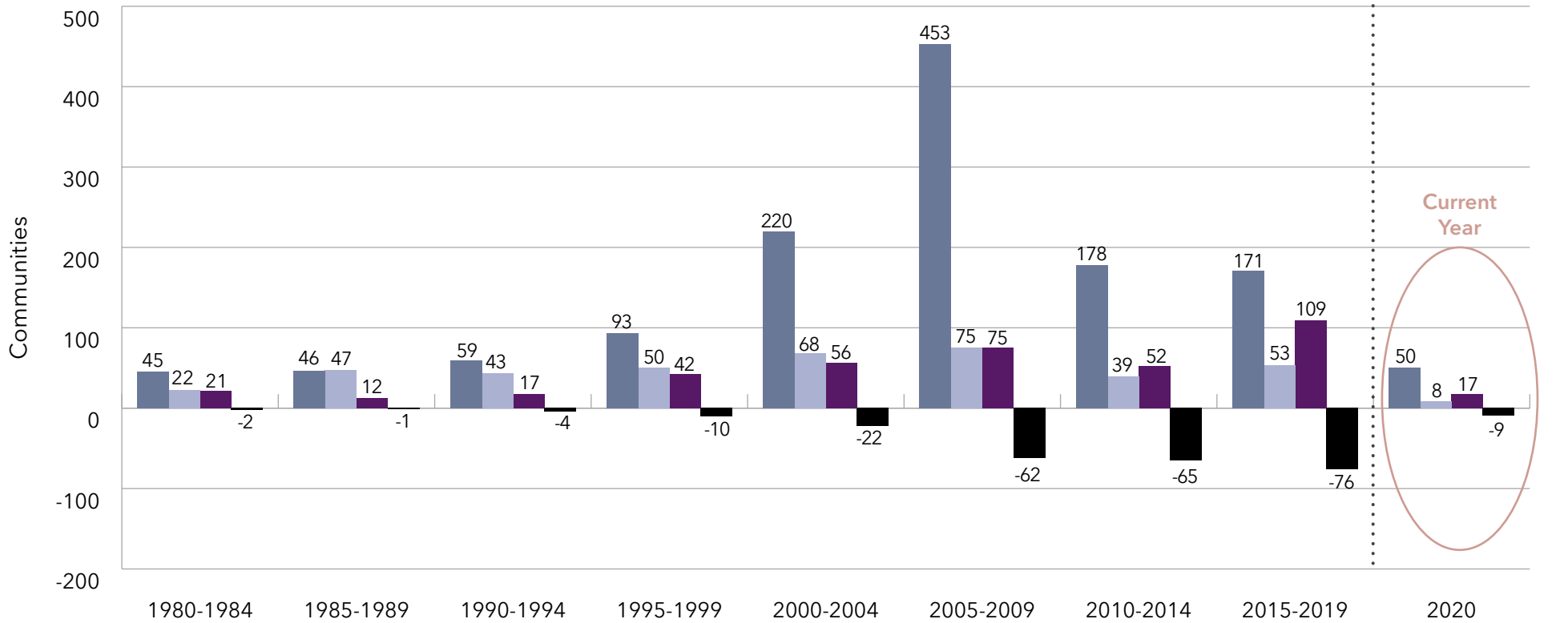
Note: Expansion to largest 150 made in 2015

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.
 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.

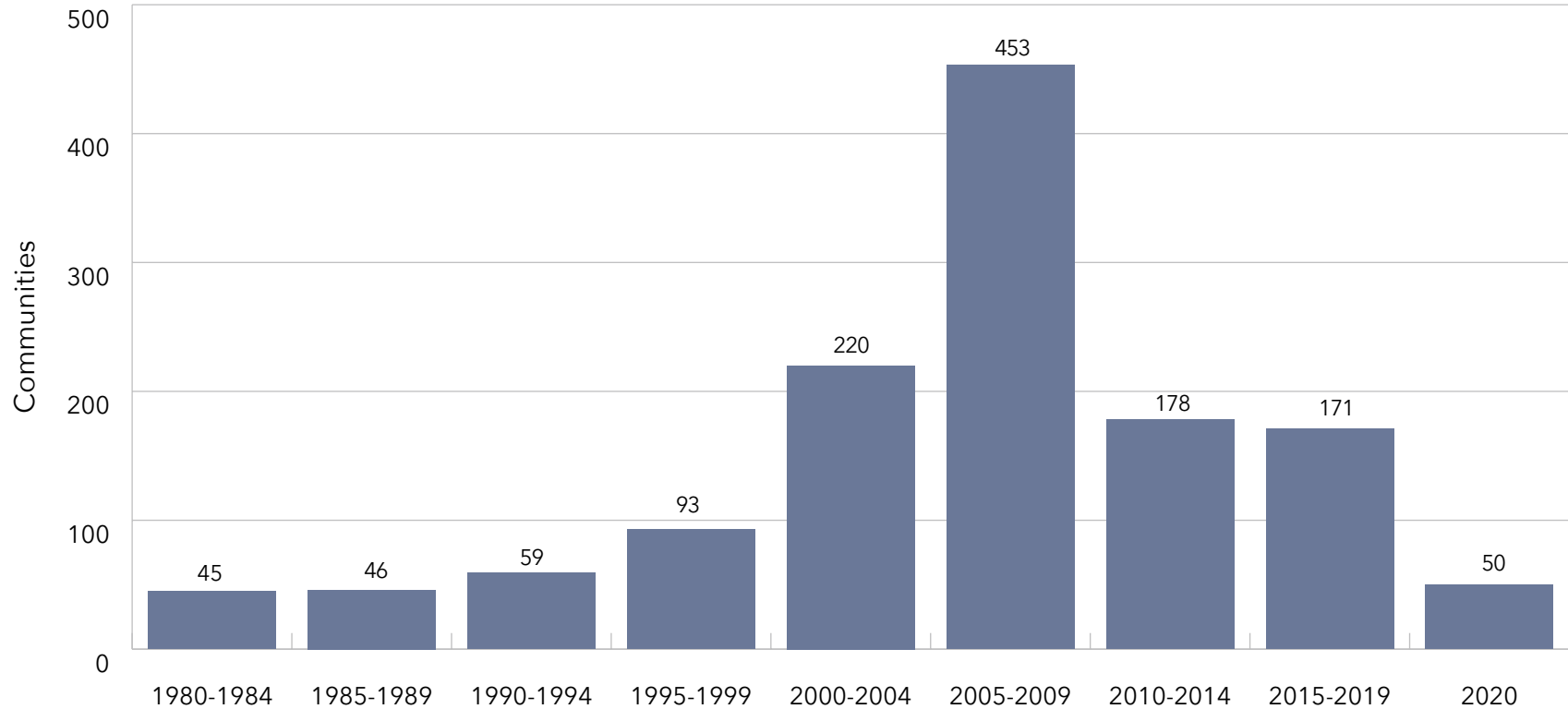
Note: Expansion to largest 150 made in 2015

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: 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

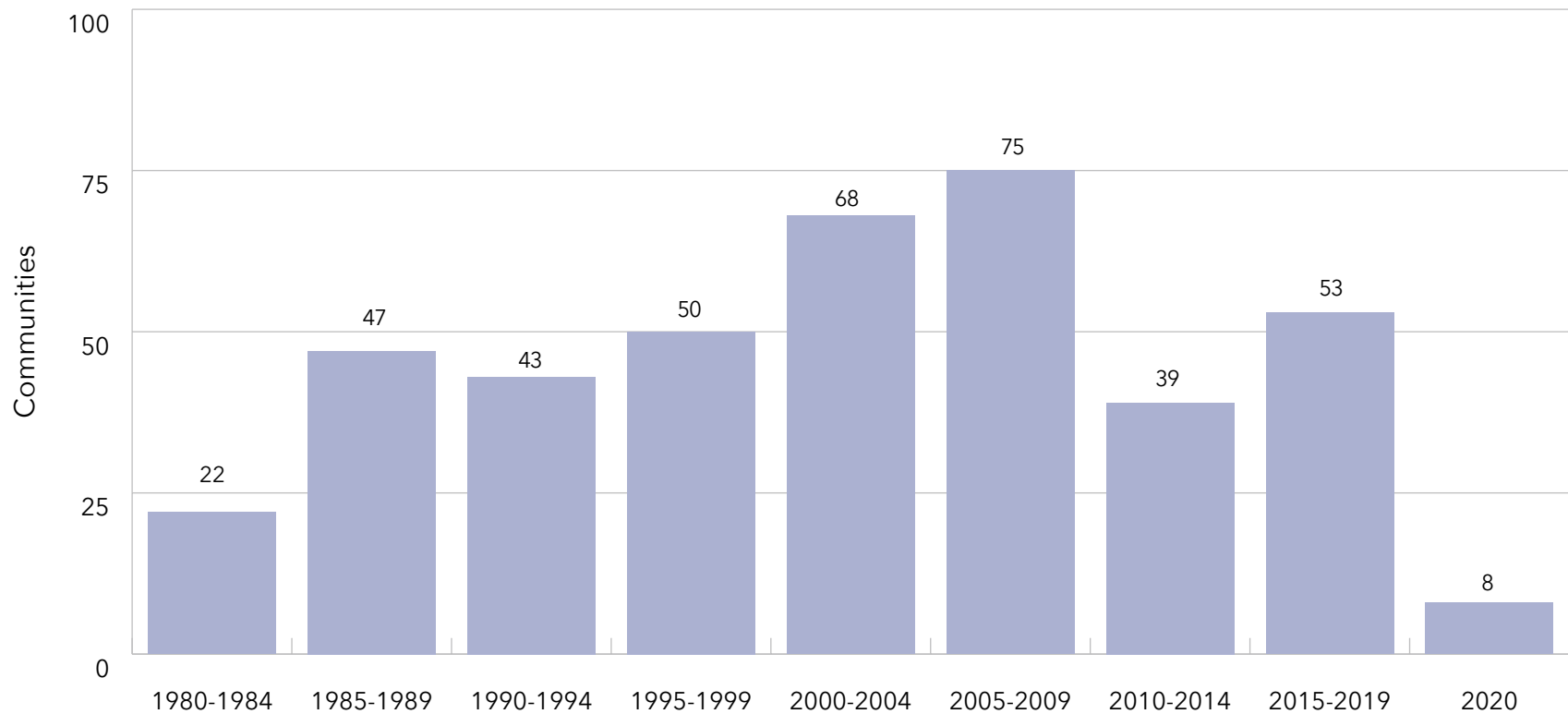
2020 Community Expansions

2021 Rank	System Name	Community	City	State	Community Type
1	National Senior Campuses, Inc.	Wind Crest	Highlands Ranch	CO	LPC
1	National Senior Campuses, Inc.	Tall Grass Creek	Overland Park	KS	LPC
1	National Senior Campuses, Inc.	Highland Springs	Dallas	TX	LPC
4	Presbyterian Homes and Services	Walnut Ridge	Clive	IA	NH
6	HumanGood	Rydal Waters	Abington	PA	IL
8	Lifespace Communities, Inc.	Abbey Delray	Delray Beach	FL	LPC
14	Lutheran Senior Services	Mason Pointe	St. Louis	MO	IL
16	Presbyterian Senior Living	Quincy Village	Waynesboro	PA	IL
28	Shell Point Retirement Community	Shell Point Retirement Community	Fort Myers	FL	LPC
39	National Church Residences	Legacy Village	Xenia	OH	IL
47	BHI Senior Living, Inc.	Hoosier Village	Zionsville	IN	LPC
62	Presbyterian Villages of Michigan	The Village of East Harbor	Chesterfield Twp	MI	IL
73	Friendship Villages of St. Louis	Friendship Village	Sunset Hills	MO	LPC
73	Friendship Villages of St. Louis	Friendship Village	Chesterfield	MO	LPC
76	United Methodist Homes	Wesley Village Campus	Pittston	PA	IL
108	Mather	Splendido	Tucson	AZ	IL
109	Garden Spot Communities	Garden Spot Village	New Holland	PA	LPC
132	Bethany Lutheran Homes, Inc.	Eagle Crest South	La Crosse	WI	LPC

Note: Due to the high volume of expansions in 2020, the cut off was less than 30 total units. There were an additional 32 expansions in 2002.

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

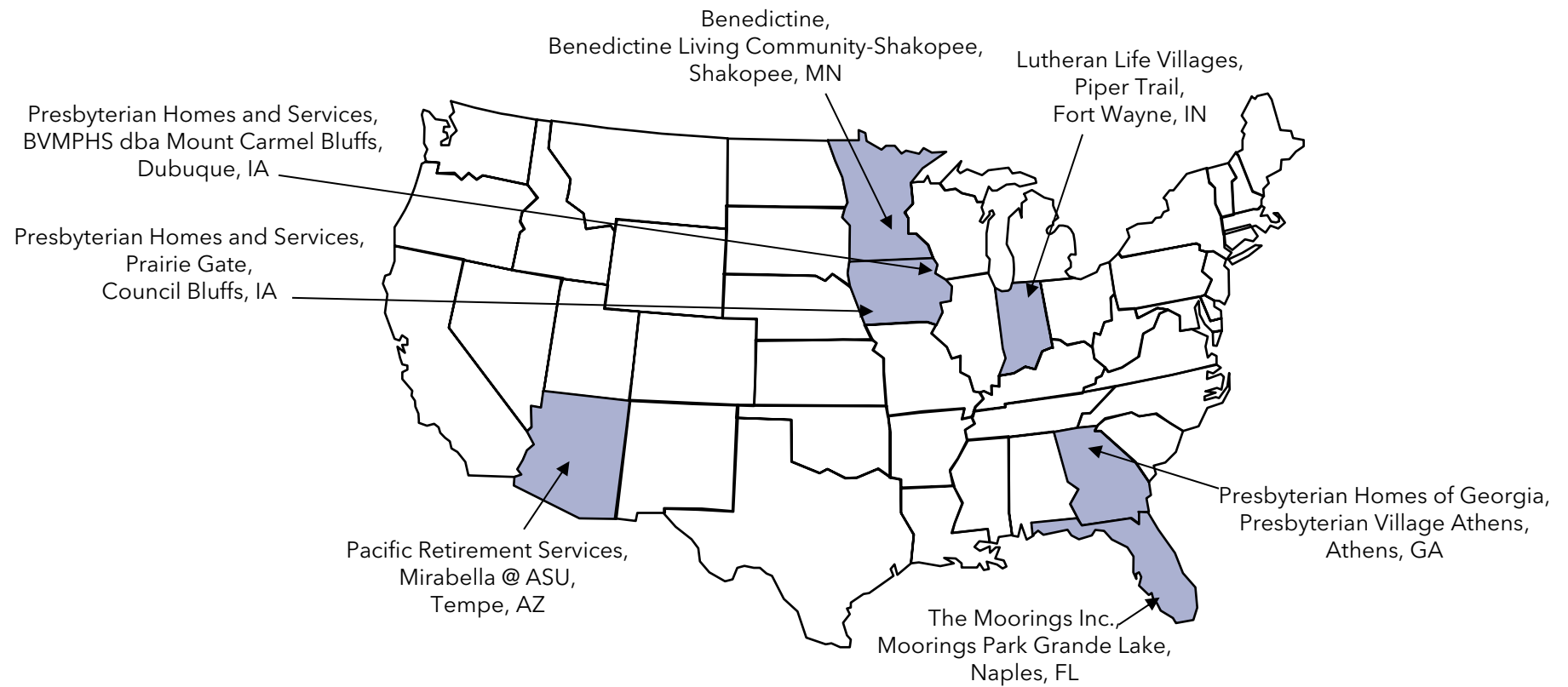
2020 Community Openings

2021 Rank	System Name	Community	City	State	Community Type
4	Presbyterian Homes and Services	Prairie Gate	Council Bluffs	IA	LPC
4	Presbyterian Homes and Services	BVMPHS dba Mount Carmel Bluffs	Dubuque	IA	LPC
10	Benedictine	Benedictine Living Community - Shakopee	Shakopee	MN	LPC
18	Pacific Retirement Services (PRS)	Mirabella @ ASU	Tempe	AZ	LPC
113	Presbyterian Homes of Georgia	Presbyterian Village Athens	Watkinsville	GA	LPC
123	The Moorings, Incorporated	Moorings Park Grande Lake	Naples	FL	IL
155	Lutheran Life Villages	Piper Trail	Fort Wayne	IN	IL

LPC = Life Care Community

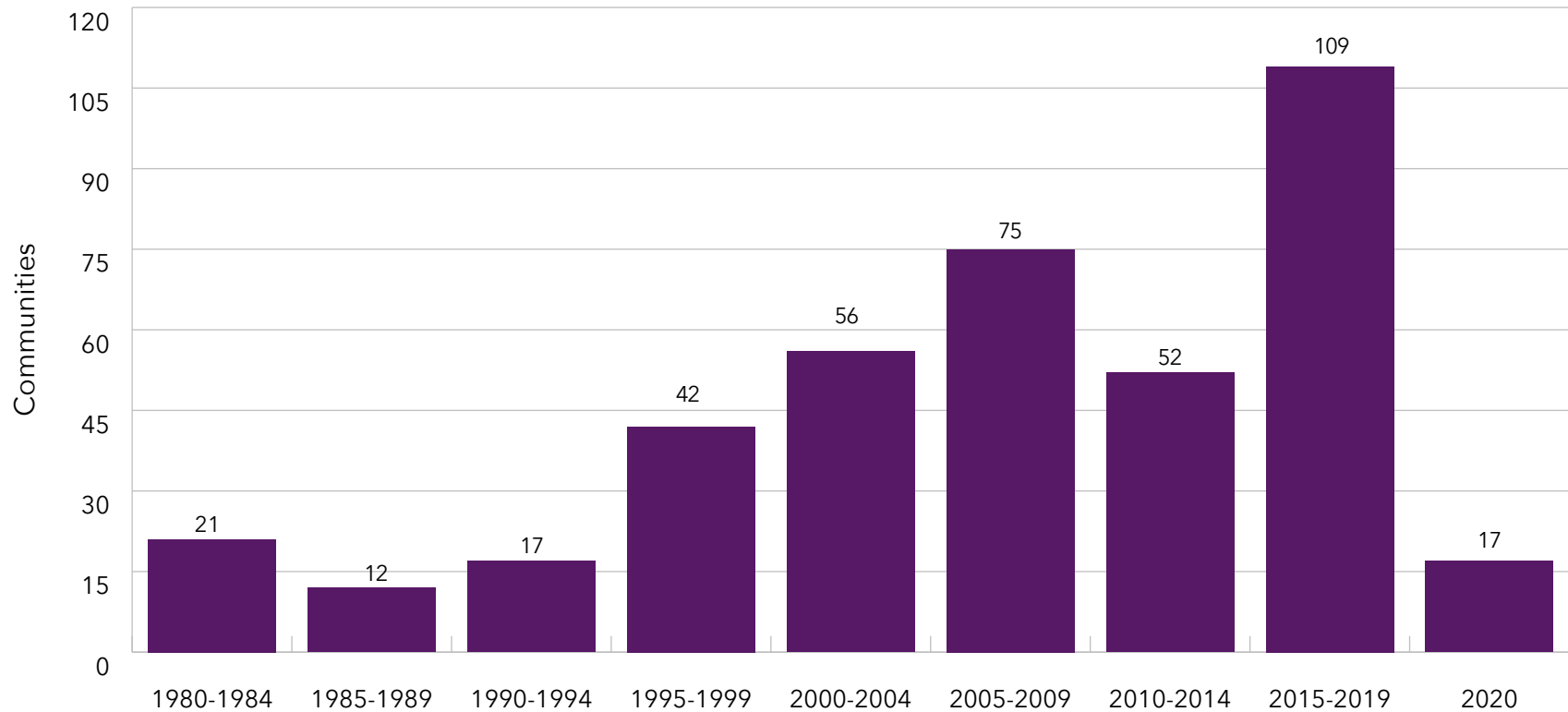
Growth: New Communities

2020 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.

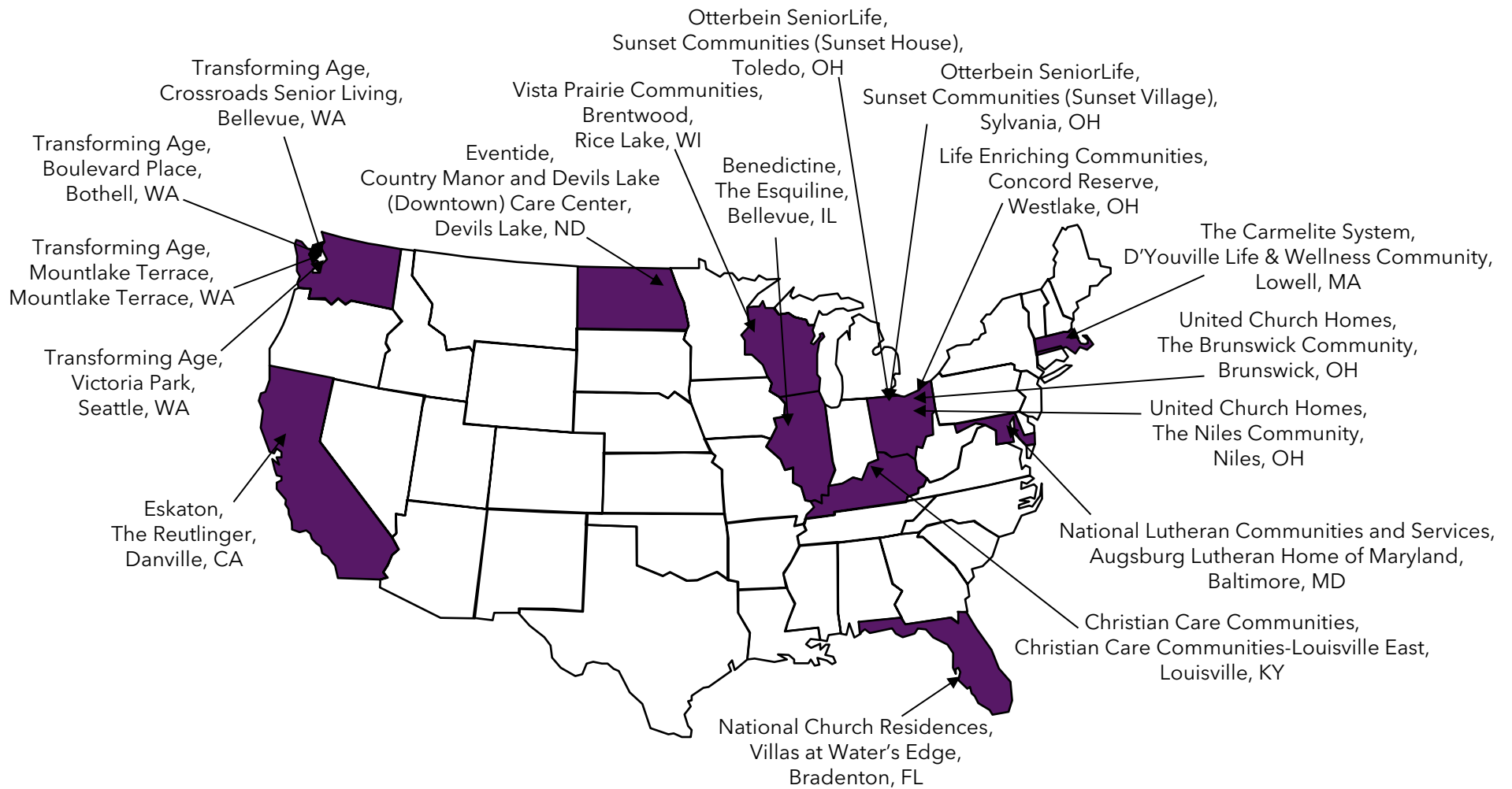
Growth: Mergers/Acquisitions/Affiliations

2020 Mergers/Acquisitions/Affiliations

2021 Rank	System Name	Community	City	State	Community Type
10	Benedictine	The Esquiline	Belleville	IL	LPC
20	Otterbein SeniorLife	Sunset Retirement Communities (Sunset House)	Toledo	OH	LPC
20	Otterbein SeniorLife	Sunset Retirement Communities (Sunset Village)	Sylvania	OH	LPC
21	The Carmelite System, Inc.	D'Youville Life and Wellness Community	Lowell	MA	LPC
27	Transforming Age	Victoria Park	Seattle	WA	IL
27	Transforming Age	Mountlake Terrace	Mountlake Terrace	WA	IL
27	Transforming Age	Boulevard Place	Bothell	WA	IL
27	Transforming Age	Crossroads Senior Living	Bellevue	WA	IL
39	National Church Residences	Villas at Water's Edge of Bradenton	Bradenton	FL	IL
41	United Church Homes, Inc.	The Brunswick Community	Brunswick	OH	IL
41	United Church Homes, Inc.	The Niles Community	Niles	OH	IL
45	Eskaton	The Reutlinger	Danville	CA	LPC
65	National Lutheran Communities and Services	Augsburg Lutheran Home of Maryland, Inc.	Baltimore	MD	LPC
75	Eventide	Lake Country Manor and Devils Lake (Downtown) Care Center	Devils Lake	ND	NH
82	Life Enriching Communities	Concord Reserve	Westlake	OH	LPC
85	Christian Care Communities	Christian Care Community - Louisville East	Louisville	KY	IL
122	Vista Prairie Communities	Brentwood	Rice Lake	WI	AL

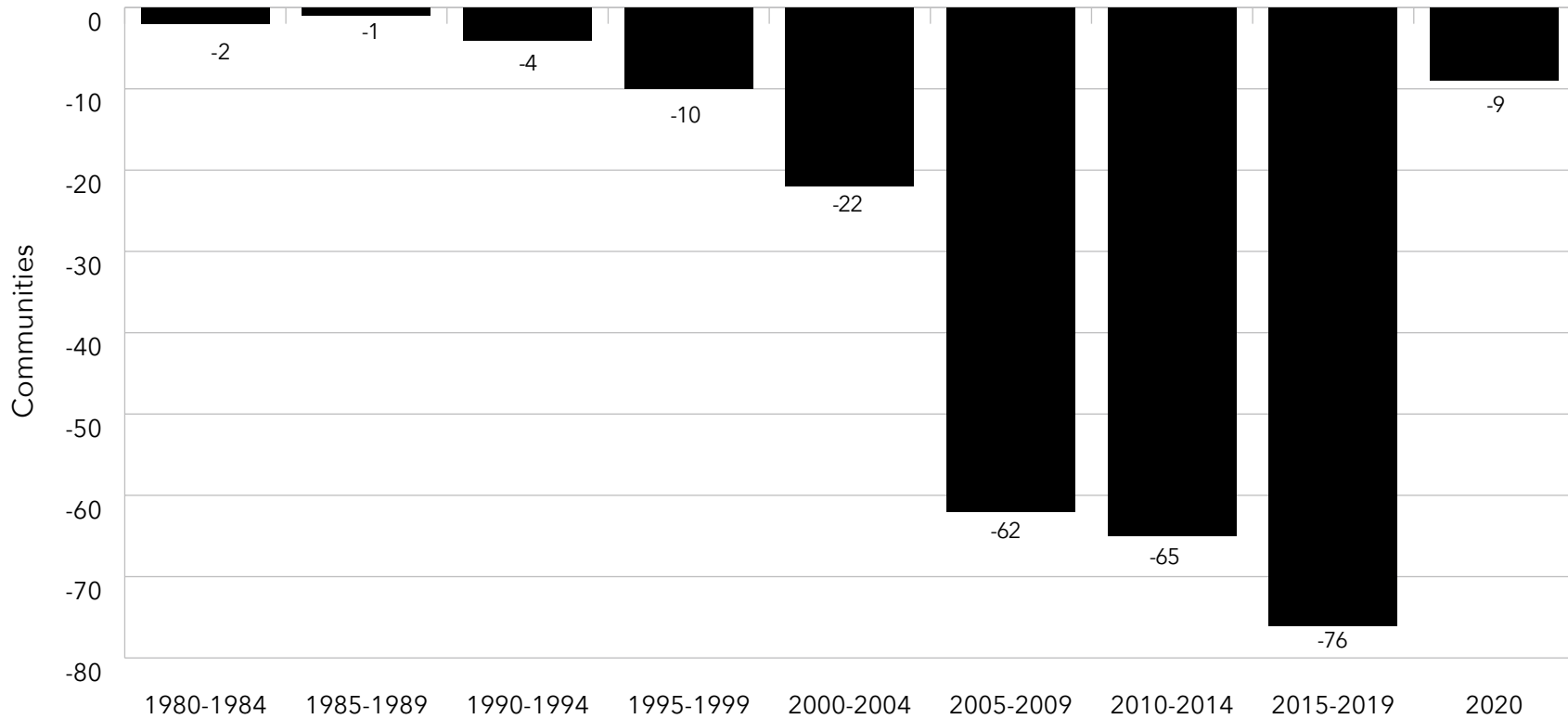
LPC = Life Care Community

Growth: Affiliations/Mergers/Acquisitions 2020 Locations



Growth: Dispositions

Historical Growth



KEY: Disposition

Disposition: The sale or closure of a community.

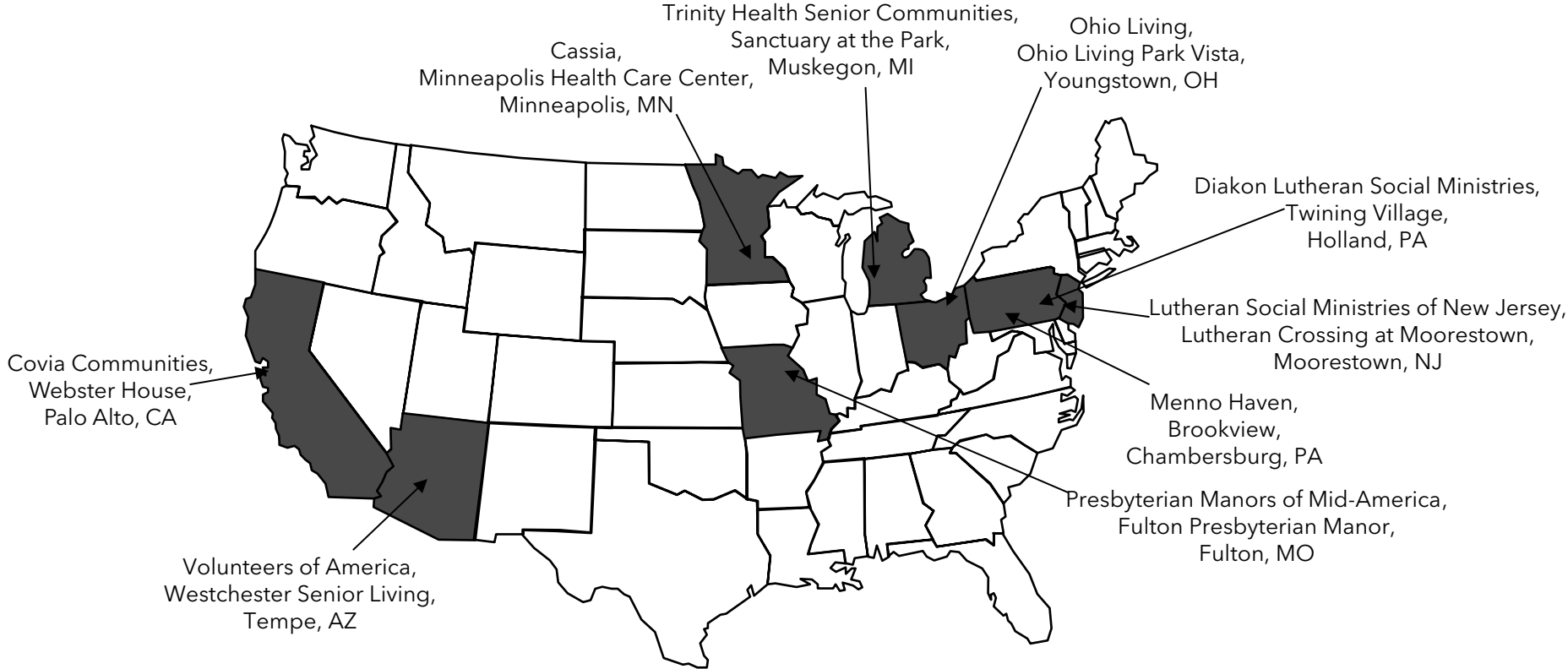
Growth: Dispositions

2020 Community Closures or Dispositions

2021 Rank	System Name	Community	City	State	Community Type
7	Trinity Health Senior Communities	Sanctuary at the Park	Muskegon	MI	NH
17	Cassia	Minneapolis Health Care Center	Minneapolis	MN	NH
19	Ohio Living	Ohio Living Park Vista	Youngstown	OH	LPC
26	Volunteers of America	Westchester Senior Living	Tempe	AZ	LPC
30	Presbyterian Manors of Mid-America, Inc	Fulton Presbyterian Manor	Fulton	MO	LPC
33	Diakon Lutheran Social Ministries	Twining Village	Holland	PA	LPC
60	Covia Communities	Webster House	Palo Alto	CA	NH
105	Menno Haven, Inc	Brookview	Chambersburg	PA	NH
176	Lutheran Social Ministries of New Jersey, Inc	Lutheran Crossing at Moorestown	Moorestown	NJ	LPC

LPC = Life Care Community

Growth: Dispositions 2020 Locations



Chapter 6

Additional Listings

Additional listings have been added to LZ 200 since its inaugural publication: single-campus senior living, largest individual campuses, 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 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 53% 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 in 2019 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 2,159 market-rate units.

Systems by Total Market-Rate and Affordable Units

Chart 6-2 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 #39 **(Primary Ranking)** with 1,768 total market-rate units while the organization is ranked #2 with 17,341 total affordable housing units. By aggregating these two categories of seniors housing, the organization is the largest among the LZ 200 with 19,109 total units.



Additional Listings: Single-Campus Senior Living Communities

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

2021 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/20)				% 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	1,534	1,086	182	266	70.8%	11.9%	17.3%
3	Henry Ford Village	Dearborn	MI	1,041	856	96	89	82.2%	9.2%	8.5%
4	The Hebrew Home at Riverdale	Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
5	Cross Keys Village - The Brethren Home Community	New Oxford	PA	963	570	123	270	59.2%	12.8%	28.0%
6	Panorama	Lacey	WA	918	735	43	140	80.1%	4.7%	15.3%
7	John Knox Village of Florida	Pompano Beach	FL	912	654	64	194	71.7%	7.0%	21.3%
8	Brethren Village	Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%
9	Mennonite Home Communities	Lancaster	PA	844	531	125	188	62.9%	14.8%	22.3%
10	Westminster Canterbury Richmond	Richmond	VA	815	493	164	158	60.5%	20.1%	19.4%
11	Charles E Smith Life Communities	Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
12	Friendship Village Tempe	Tempe	AZ	780	561	91	128	71.9%	11.7%	16.4%
13	Lakeview Village	Lenexa	KS	718	534	26	158	74.4%	3.6%	22.0%
14	The Center for Modern Aging at Glencroft	Glendale	AZ	710	386	99	225	54.4%	13.9%	31.7%
15	Indiana Masonic Home	Franklin	IN	702	120	317	265	17.1%	45.2%	37.7%
16	The Beatitudes Campus	Phoenix	AZ	688	495	121	72	71.9%	17.6%	10.5%
17	Atlantic Shores Cooperative Association	Virginia Beach	VA	671	555	66	50	82.7%	9.8%	7.5%
18	John Knox Village of Central Florida	Orange City	FL	654	455	199	0	69.6%	30.4%	0.0%
19	Mary's Woods at Marylhurst	Lake Oswego	OR	638	481	134	23	75.4%	21.0%	3.6%
20	Westminster-Canterbury on Chesapeake Bay	Virginia Beach	VA	638	450	80	108	70.5%	12.5%	16.9%
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	Rolling Green Village	Greenville	SC	624	502	50	72	80.4%	8.0%	11.5%
25	VMP	West Allis	WI	624	294	180	150	47.1%	28.8%	24.0%

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

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

2021 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	Carolina Meadows, Inc.	Chapel Hill	NC	611	447	78	86	73.2%	12.8%	14.1%
27	La Posada at Park Centre Inc.	Sahuarita	AZ	608	471	137	0	77.5%	22.5%	0.0%
28	Twin Lakes Community	Burlington	NC	606	434	56	116	71.6%	9.2%	19.1%
29	Springmoor Life Care Retirement Community	Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
30	Kirby Pines Lifecare Community	Memphis	TN	580	396	94	90	68.3%	16.2%	15.5%
31	Presbyterian Village North	Dallas	TX	571	253	146	172	44.3%	25.6%	30.1%
32	St. Camillus	Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
33	Masonic Care Community of New York	Utica	NY	551	151	80	320	27.4%	14.5%	58.1%
34	The Mennonite Village	Albany	OR	547	321	131	95	58.7%	23.9%	17.4%
35	Aldersgate UMRC	Charlotte	NC	541	302	114	125	55.8%	21.1%	23.1%
36	Casa de las Campanas	San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
37	Royal Oaks Life Care Community	Sun City	AZ	535	360	175	0	67.3%	32.7%	0.0%
38	Cypress Cove at HealthPark Florida	Fort Myers	FL	529	377	88	64	71.3%	16.6%	12.1%
39	Pine Run Community	Doylestown	PA	525	288	147	90	54.9%	28.0%	17.1%
40	Fleet Landing	Atlantic Beach	FL	524	354	100	70	67.6%	19.1%	13.4%
41	Copeland Oaks	Sebring	OH	522	122	224	176	23.4%	42.9%	33.7%
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	Carolina Village, Inc.	Hendersonville	NC	507	389	60	58	76.7%	11.8%	11.4%
47	Deerfield Episcopal Retirement Community, Inc.	Asheville	NC	502	378	62	62	75.3%	12.4%	12.4%
48	Londonderry Village	Palmyra	PA	500	374	38	88	74.8%	7.6%	17.6%
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

2021 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	Marquette	Indianapolis	IN	493	314	77	102	63.7%	15.6%	20.7%
52	Bridgewater Retirement Community	Bridgewater	VA	493	280	86	127	56.8%	17.4%	25.8%
53	Williamsburg Landing Inc.	Williamsburg	VA	486	317	96	73	65.2%	19.8%	15.0%
54	Moravian Manor Communities	Liitz	PA	478	299	60	119	62.6%	12.6%	24.9%
55	Montereau	Tulsa	OK	475	328	73	74	69.1%	15.4%	15.6%
56	Virginia Mennonite Retirement Community	Harrisonburg	VA	470	264	86	120	56.2%	18.3%	25.5%
57	Horizon House	Seattle	WA	467	377	90	0	80.7%	19.3%	0.0%
58	Epworth Villa	Oklahoma City	OK	467	264	116	87	56.5%	24.8%	18.6%
59	Masonic Village At Burlington	Burlington	NJ	463	233	87	143	50.3%	18.8%	30.9%
60	Paradise Valley Estates	Fairfield	CA	461	321	80	60	69.6%	17.4%	13.0%
61	O'Connor Woods	Stockton	CA	461	245	116	100	53.1%	25.2%	21.7%
62	Orlando Senior Health Network	Orlando	FL	459	204	87	168	44.4%	19.0%	36.6%
63	White Horse Village	Newtown Square	PA	458	331	68	59	72.3%	14.8%	12.9%
64	St. Mark Village Inc.	Palm Harbor	FL	458	253	128	77	55.2%	27.9%	16.8%
65	Waterman Village	Mount Dora	FL	456	259	77	120	56.8%	16.9%	26.3%
66	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
67	Mercy Ridge, Inc.	Timonium	MD	455	408	47	0	89.7%	10.3%	0.0%
68	Cornwall Manor	Cornwall	PA	451	325	30	96	72.1%	6.7%	21.3%
69	Lutheran Social Services of Upstate New York	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
70	Mt. San Antonio Gardens	Pomona	CA	444	305	71	68	68.7%	16.0%	15.3%
71	St. Paul Homes	Greenville	PA	442	106	144	192	24.0%	32.6%	43.4%
72	Seabury	Bloomfield	CT	440	252	116	72	57.3%	26.4%	16.4%
73	North Hill	Needham	MA	438	321	45	72	73.3%	10.3%	16.4%
74	The Good Samaritan Home of Quincy	Quincy	IL	437	180	54	203	41.2%	12.4%	46.5%
75	Westminster	Austin	TX	435	328	22	85	75.4%	5.1%	19.5%

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

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

2021 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	Falcons Landing	Sterling	VA	435	304	71	60	69.9%	16.3%	13.8%
77	Arbor Acres United Methodist Retirement Community, Inc.	Winston-Salem	NC	435	255	97	83	58.6%	22.3%	19.1%
78	Carol Woods	Chapel Hill	NC	434	315	89	30	72.6%	20.5%	6.9%
79	The Trezevant Episcopal Home	Memphis	TN	434	226	104	104	52.1%	24.0%	24.0%
80	Greenwood Village South	Greenwood	IN	433	258	45	130	59.6%	10.4%	30.0%
81	Marquardt Village	Watertown	WI	433	201	92	140	46.4%	21.2%	32.3%
82	Peter Becker Community	Harleysville	PA	430	295	63	72	68.6%	14.7%	16.7%
83	Dunwoody Village	Newtown Square	PA	429	267	81	81	62.2%	18.9%	18.9%
84	Mease Life, Inc. fka Mease Manor	Dunedin	FL	429	192	137	100	44.8%	31.9%	23.3%
85	The Highlands at Wyomissing	Wyomissing	PA	428	282	66	80	65.9%	15.4%	18.7%
86	The Forum at Rancho San Antonio	Cupertino	CA	425	319	58	48	75.1%	13.6%	11.3%
87	Penney Retirement Community, Inc.	Penney Farms	FL	422	297	75	50	70.4%	17.8%	11.8%
88	Laurel Lake Retirement Community	Hudson	OH	422	291	56	75	69.0%	13.3%	17.8%
89	The Glenridge on Palmer Ranch, Inc.	Sarasota	FL	414	304	49	61	73.4%	11.8%	14.7%
90	Oak Hammock at the University of Florida Inc	Gainesville	FL	412	269	70	73	65.3%	17.0%	17.7%
91	Aldersgate Village	Topeka	KS	412	156	60	196	37.9%	14.6%	47.6%
92	Broadmead	Cockeysville	MD	411	301	40	70	73.2%	9.7%	17.0%
93	Meadowood	Worcester	PA	408	293	56	59	71.8%	13.7%	14.5%
94	Bay Village of Sarasota, Inc.	Sarasota	FL	401	284	22	95	70.8%	5.5%	23.7%
95	Well•Spring A Life Plan Community	Greensboro	NC	401	261	70	70	65.1%	17.5%	17.5%
96	Westminster Canterbury of Lynchburg	Lynchburg	VA	400	239	56	105	59.8%	14.0%	26.3%
97	Peconic Landing	Greenport	NY	398	296	42	60	74.4%	10.6%	15.1%
98	EdenHill Communities	New Braunfels	TX	398	147	67	184	36.9%	16.8%	46.2%
99	Quarryville Presbyterian Retirement Community	Quarryville	PA	397	218	69	110	54.9%	17.4%	27.7%
100	Westminster Village North	Terre Haute	IN	397	158	91	148	39.8%	22.9%	37.3%

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

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

2021 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
101	Willamette View Inc	Portland	OR	393	300	87	6	76.3%	22.1%	1.5%
102	Brandermill Woods	Midlothian	VA	393	274	59	60	69.7%	15.0%	15.3%
103	Kahala Nui	Honolulu	HI	393	270	63	60	68.7%	16.0%	15.3%
104	Bishop Gadsden	Charleston	SC	392	268	74	50	68.4%	18.9%	12.8%
105	Fellowship Senior Living	Basking Ridge	NJ	392	257	81	54	65.6%	20.7%	13.8%
106	Pennswood Village	Newtown	PA	391	301	37	53	77.0%	9.5%	13.6%
107	Galloway Ridge	Pittsboro	NC	391	300	51	40	76.7%	13.0%	10.2%
108	Fraiser	Boulder	CO	390	298	38	54	76.4%	9.7%	13.8%
109	Westminster-Canterbury of the Blue Ridge	Charlottesville	VA	390	281	57	52	72.1%	14.6%	13.3%
110	Salemtowne	Winston-Salem	NC	390	224	66	100	57.4%	16.9%	25.6%
111	Southminster, Inc.	Charlotte	NC	387	302	25	60	78.0%	6.5%	15.5%
112	Foulkeways at Gwynedd	Gwynedd	PA	387	252	89	46	65.1%	23.0%	11.9%
113	Homestead Village, Inc.	Lancaster	PA	387	229	87	71	59.2%	22.5%	18.3%
114	eliseo fka Tacoma Lutheran Retirement Community	Tacoma	WA	387	146	54	187	37.7%	14.0%	48.3%
115	The Pines at Whiting	Manchester	NJ	385	232	87	66	60.3%	22.6%	17.1%
116	The Hill at Whitemarsh	Lafayette Hill	PA	382	294	28	60	77.0%	7.3%	15.7%
117	The Osborn	Rye	NY	382	195	103	84	51.0%	27.0%	22.0%
118	Wesbury UM Retirement Community	Meadville	PA	382	81	91	210	21.2%	23.8%	55.0%
119	Snyder Village	Metamora	IL	381	210	65	106	55.1%	17.1%	27.8%
120	Warm Hearth Village	Blacksburg	VA	380	170	150	60	44.7%	39.5%	15.8%
121	Butterfield Trail Village, Inc.	Fayetteville	AR	376	274	15	87	72.9%	4.0%	23.1%
122	The Meth-Wick Community	Cedar Rapids	IA	376	247	60	69	65.7%	16.0%	18.4%
123	Village On The Isle	Venice	FL	373	245	64	64	65.7%	17.2%	17.2%
124	St. James Place	Baton Rouge	LA	372	216	66	90	58.1%	17.7%	24.2%
125	Tabor Hills Healthcare	Naperville	IL	368	104	95	169	28.3%	25.8%	45.9%

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

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

2021 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
126	Peabody Retirement Community	North Manchester	IN	367	57	118	192	15.5%	32.2%	52.3%
127	Jefferson's Ferry	South Setauket	NY	366	246	60	60	67.2%	16.4%	16.4%
128	The Pines at Davidson	Davidson	NC	364	250	30	84	68.7%	8.2%	23.1%
129	Dallas Retirement Village	Dallas	OR	364	158	85	121	43.4%	23.4%	33.2%
130	Capital Manor	Salem	OR	363	280	83	0	77.1%	22.9%	0.0%
131	Westminster Village Inc.	Bloomington	IL	363	195	72	96	53.7%	19.8%	26.4%
132	Pleasant View Retirement Community	Manheim	PA	362	152	95	115	42.0%	26.2%	31.8%
133	Meadowlark Hills	Manhattan	KS	357	167	55	135	46.8%	15.4%	37.8%
134	Brewster Place	Topeka	KS	356	231	28	97	64.9%	7.9%	27.2%
135	Brethren Hillcrest Homes	La Verne	CA	356	225	72	59	63.2%	20.2%	16.6%
136	Westerwood fka Friendship Village of Columbus	Columbus	OH	356	201	80	75	56.5%	22.5%	21.1%
137	Pennybyrn at Maryfield, Inc.	High Point	NC	353	180	48	125	51.0%	13.6%	35.4%
138	Atherton Baptist Homes	Alhambra	CA	352	217	36	99	61.6%	10.2%	28.1%
139	Brookhaven at Lexington	Lexington	MA	350	290	48	12	82.9%	13.7%	3.4%
140	Niagara Lutheran Health System	Lancaster	NY	349	92	97	160	26.4%	27.8%	45.8%
141	Wake Robin	Shelburne	VT	346	250	41	55	72.3%	11.8%	15.9%
142	Plymouth Place Inc	La Grange Park	IL	346	182	78	86	52.6%	22.5%	24.9%
143	Sunnyside Village	Sarasota	FL	342	226	56	60	66.1%	16.4%	17.5%
144	The Forest at Duke	Durham	NC	341	249	34	58	73.0%	10.0%	17.0%
145	The Mayflower Retirement Community	Winter Park	FL	339	248	31	60	73.2%	9.1%	17.7%
146	Nazareth Living Center	St. Louis	MO	335	100	114	121	29.9%	34.0%	36.1%
147	Friendsview Retirement Community	Newberg	OR	333	232	101	0	69.7%	30.3%	0.0%
148	Wesley Commons	Greenwood	SC	333	193	60	80	58.0%	18.0%	24.0%
149	Spanish Cove Retirement Village	Yukon	OK	327	215	55	57	65.7%	16.8%	17.4%
150	Shenandoah Valley Westminster Canterbury	Winchester	VA	326	215	60	51	66.0%	18.4%	15.6%
								60.2%	17.5%	22.3%

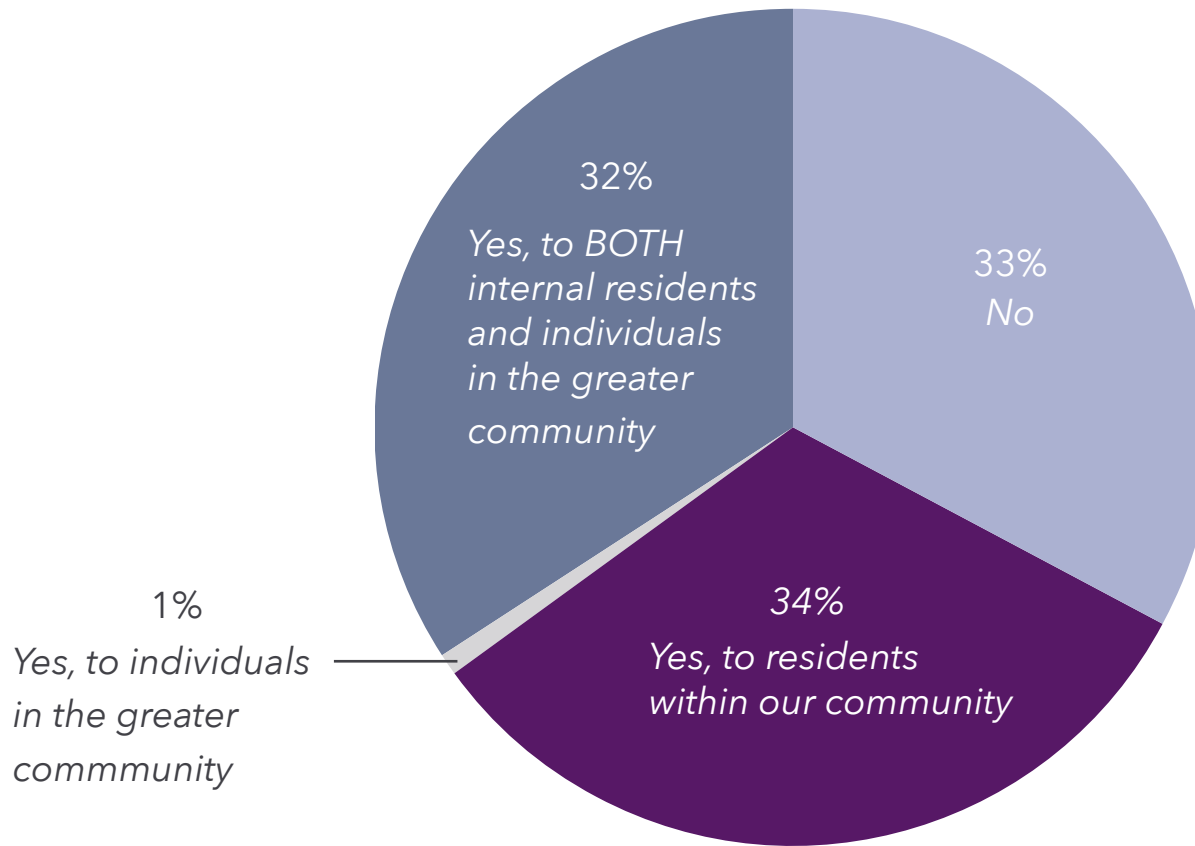
Additional Listings: Single-Campus Senior Living Communities The Over 150

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 (325 to 296 Total Units)	Over 150 (296 to 251 Total Units)
Attic Angel Community (WI)	Bartels Lutheran Home (IA)
Brevillier Village (PA)	Baywood Court (CA)
Burcham Hills (MI)	Beacon Hill at Eastgate (MI)
California Armenian Homes and The Vineyards (CA)	Bishop Drumm (IA)
Carleton-Willard Homes, Inc. (MA)	Blakeford at Green Hills (TN)
Carlyle Place (GA)	Canterbury-on-the-Lake (MI)
Clare Oaks Senior Living (IL)	Christwood (LA)
Edgewood (MA)	Church of Christ Care Center (MI)
Evergreen Retirement Community (WI)	Clark-Lindsey Village, Inc. (IL)
Foxdale Village (PA)	Clement Manor (WI)
Frederick Living (PA)	Duncaster (CT)
Ginger Cove (MD)	Florida Presbyterian Homes (FL)
Hartsfield Village (IN)	Green Hills Community (OH)
Oklahoma Methodist Manor (OK)	Hill View Retirement Community (OH)
Sierra Winds (AZ)	Immanuel Lutheran Communities (MT)
South Carolina Episcopal Home at Still Hopes (SC)	Lambeth House (LA)
Spring Harbor at Green Island (GA)	Milwaukee Catholic Home, Inc. (WI)
St. Martin's in the Pines (AL)	Piper Shores (ME)
The Briarwood Community (MA)	RiverMead (NH)
The Methodist Oaks (SC)	Rose Villa (OR)
The Sarah Community (MO)	St. Anne's Retirement Community (PA)
Vicar's Landing (FL)	Swiss Village, Inc. (IN)
Waverly Heights Ltd. (PA)	The Glen Retirement System (LA)
Westminster Village (NY)	Three Pillars Senior Living (WI)
Woodland Pond at New Paltz (NY)	Timbercrest Senior Living Community (IN)

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

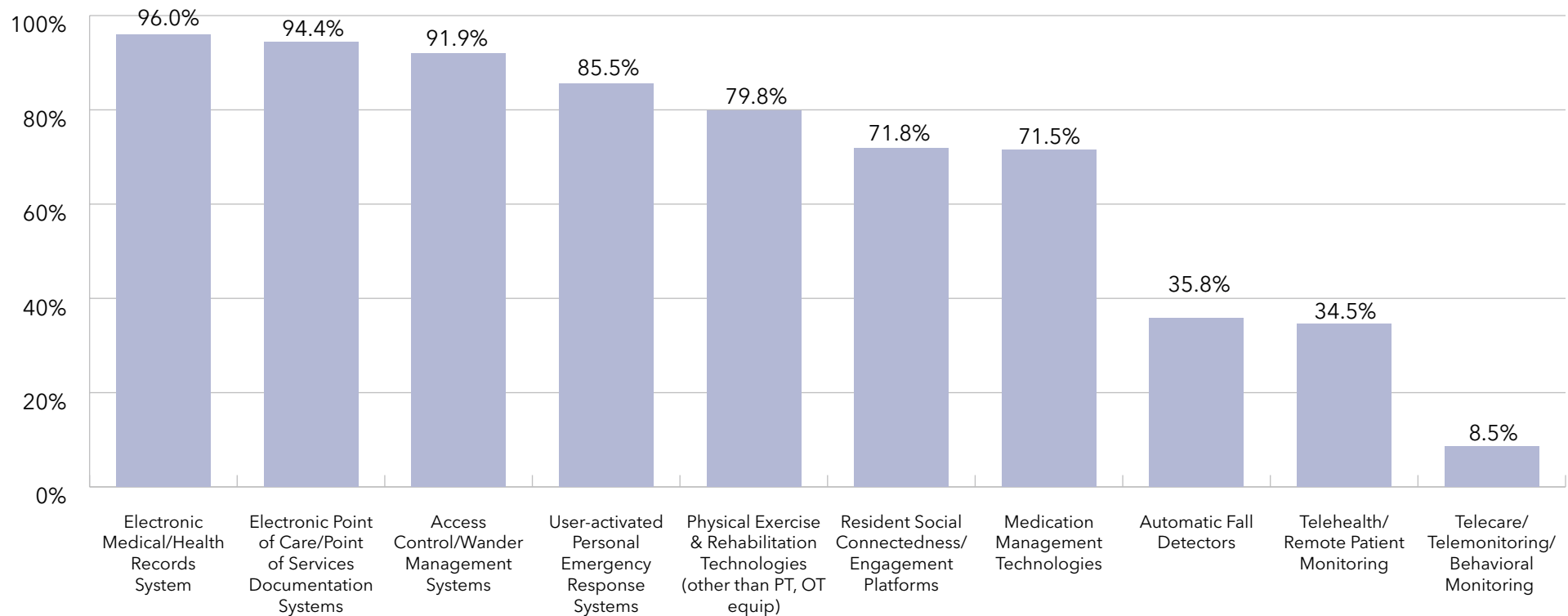
Do you currently offer any type of
Home & Community-Based Services?



n = 122

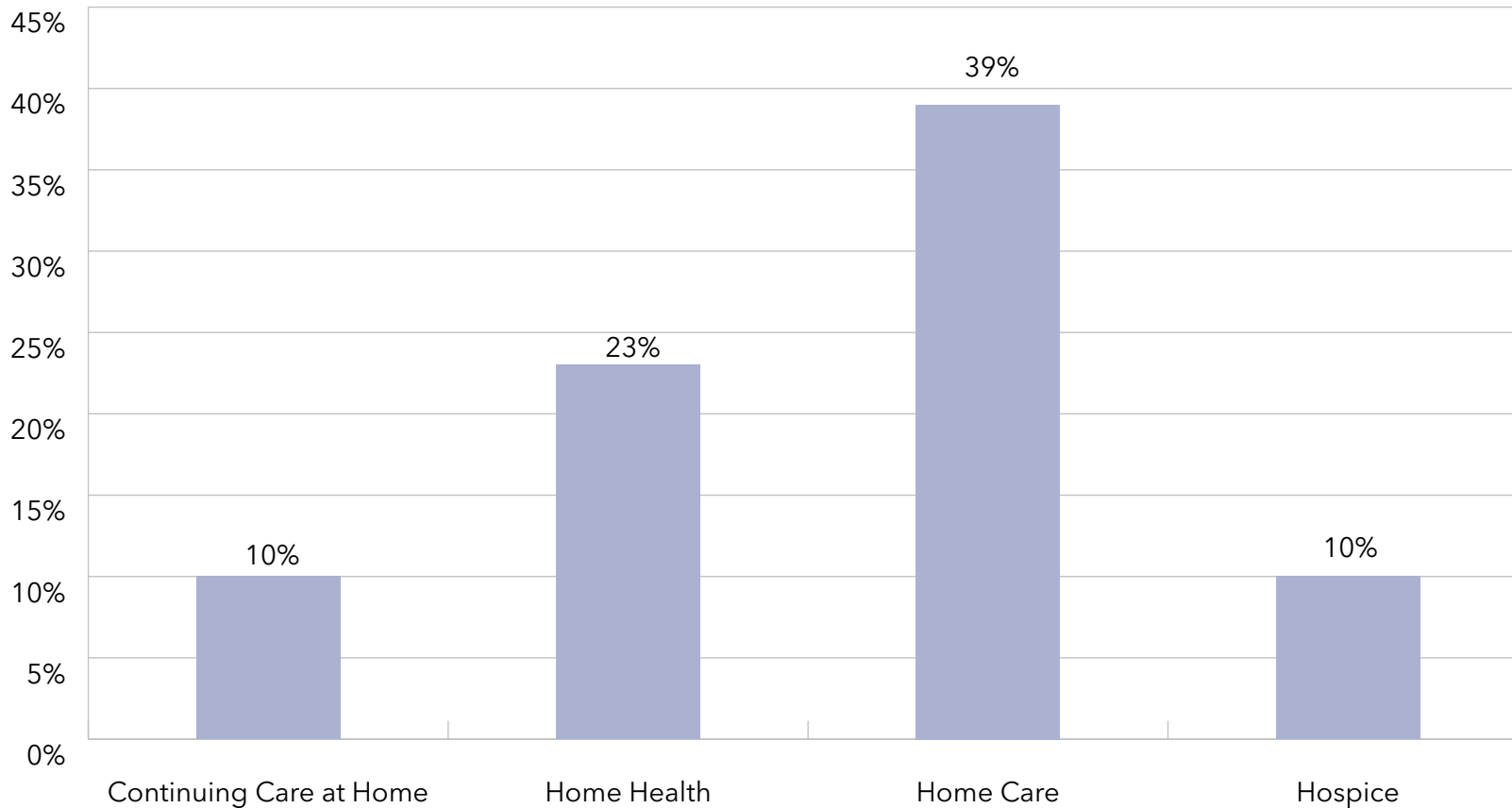
Additional Listings: Single-Campus Senior Living Communities

Technology Adoption: The Largest 150 Single-Campus Providers



n = 122 (avg)

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



n = 122 (avg)

Additional Listings: Largest Individual Campuses

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

2021 Rank	2020 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
1	1	Riderwood Village	National Senior Campuses	Silver Spring	MD	2,159	1,798	244	117	83.3%	11.3%	5.4%
2	2	Shell Point Retirement Community	The Christian & Missionary Alliance Foundation, Inc.	Fort Myers	FL	1,925	1,303	424	198	67.7%	22.0%	10.3%
3	3	Oak Crest	National Senior Campuses	Parkville	MD	1,829	1,498	171	160	81.9%	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	1,655	1,384	179	92	83.6%	10.8%	5.6%
6	6	Ann's Choice	National Senior Campuses	Warminster	PA	1,653	1,472	105	76	89.1%	6.4%	4.6%
7	7	Cedar Crest Village	National Senior Campuses	Pompton Plains	NJ	1,639	1,444	82	113	88.1%	5.0%	6.9%
8	8	Masonic Village at Elizabethtown	Masonic Villages of the Grand Lodge of Pennsylvania	Elizabethtown	PA	1,595	1,009	133	453	63.3%	8.3%	28.4%
9	9	Brooksby Village	National Senior Campuses	Peabody	MA	1,554	1,344	124	86	86.5%	8.0%	5.5%
10	10	John Knox Village		Lee's Summit	MO	1,534	1,086	182	266	70.8%	11.9%	17.3%
11	11	Maris Grove	National Senior Campuses	Glen Mills	PA	1,292	1,115	89	88	86.3%	6.9%	6.8%
12	12	Fox Run	National Senior Campuses	Novi	MI	1,273	1,141	88	44	89.6%	6.9%	3.5%
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	1,074	931	99	44	86.7%	9.2%	4.1%
17	17	Henry Ford Village		Dearborn	MI	1,041	856	96	89	82.2%	9.2%	8.5%
18	18	The Hebrew Home at Riverdale		Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
19	26	Highland Springs	National Senior Campuses	Dallas	TX	970	970	0	0		0.0%	0.0%
20	22	Cross Keys Village - The Brethren Home Community		New Oxford	PA	963	570	123	270	59.2%	12.8%	28.0%
21	21	Willow Valley Lakes Manor	Willow Valley Communities	Lancaster	PA	934	706	143	85	75.6%	15.3%	9.1%
22	19	Panorama		Lacey	WA	918	735	43	140	80.1%	4.7%	15.3%
23	23	John Knox Village of Florida		Pompano Beach	FL	912	654	64	194	71.7%	7.0%	21.3%
24	20	Friendship Village of Schaumburg	Friendship Senior Options	Schaumburg	IL	891	585	106	200	65.7%	11.9%	22.4%
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

2021 Rank	2020 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
26	27	Brethren Village		Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%
27	28	Mennonite Home Communities		Lancaster	PA	844	531	125	188	62.9%	14.8%	22.3%
28	29	Westminster Canterbury Richmond		Richmond	VA	815	493	164	158	60.5%	20.1%	19.4%
29	30	St. John's Homes & Meadows		Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
30	31	Rogue Valley Manor		Medford	OR	806	605	97	104	75.1%	12.0%	12.9%
31	32	Heritage Pointe	United Methodist Memorial Home	Warren	IN	796	152	458	186	19.1%	57.5%	23.4%
32	34	Greencroft Goshen	Greencroft Communities	Goshen	IN	793	424	129	240	53.5%	16.3%	30.3%
33	35	Charles E. Smith Life Communities		Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
34	33	Friendship Village Tempe		Tempe	AZ	780	561	91	128	71.9%	11.7%	16.4%
35	37	Glencroft Senior Living		Glendale	AZ	776	470	99	207	60.6%	12.8%	26.7%
36	39	The Wartburg Adult Care Community		Mount Vernon	NY	758	505	105	148	66.6%	13.9%	19.5%
37	41	Western Home Communities Main Campus	Western Home Communities	Cedar Falls	IA	754	414	200	140	54.9%	26.5%	18.6%
38	43	Indian River Estates	Acts Retirement-Life Communities	Vero Beach	FL	748	568	60	120	75.9%	8.0%	16.0%
39	40	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	748	326	280	142	43.6%	37.4%	19.0%
40	38	Luther Manor	United Lutheran Program for the Aging	Wauwatosa	WI	744	381	158	205	51.2%	21.2%	27.6%
41	42	Laclede Groves	Lutheran Senior Services	Webster Groves	MO	741	360	131	250	48.6%	17.7%	33.7%
42	44	Bethany Lutheran Village		Dayton	OH	739	383	109	247	51.8%	14.7%	33.4%
43	48	Willow Valley Manor North	Willow Valley Communities	Lancaster	PA	735	495	91	149	67.3%	12.4%	20.3%
44	46	Otterbein Lebanon Retirement Community		Lebanon	OH	729	455	68	206	62.4%	9.3%	28.3%
45	45	Passavant Retirement Community	Lutheran SeniorLife	Zelienople	PA	729	256	214	259	35.1%	29.4%	35.5%
46	47	Lakeview Village		Lenexa	KS	718	534	26	158	74.4%	3.6%	22.0%
47	49	The Center for Modern Aging at Glencroft		Glendale	AZ	710	386	99	225	54.4%	13.9%	31.7%
48	50	Compass Park Indiana Masonic Home		Franklin	IN	702	120	317	265	17.1%	45.2%	37.7%
49	51	Indiana Masonic Home		Franklin	IN	702	120	317	265	17.1%	45.2%	37.7%
50	72	Garden Spot Village	Garden Spot Communities	New Holland	PA	699	594	105	0	85.0%	15.0%	0.0%

Additional Listings: Largest Individual Campuses (Continued)

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

2021 Rank	2020 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
51	52	Landis Homes	Landis Communities	Lititz	PA	698	514	81	103	73.6%	11.6%	14.8%
52	60	The Beatitudes Campus		Phoenix	AZ	688	495	121	72	71.9%	17.6%	10.5%
53	53	MorseLife		West Palm Beach	FL	688	284	94	310	41.3%	13.7%	45.1%
54	54	Eagle's Trace	National Senior Campuses	Houston	TX	686	686	0	0	100.0%	0.0%	0.0%
55	55	Atlantic Shores Cooperative Association		Virginia Beach	VA	671	555	66	50	82.7%	9.8%	7.5%
56	56	Augustana Care Minneapolis	Cassia	Minneapolis	MN	671	366	0	305	54.5%	0.0%	45.5%
57	57	Waverly Gardens	Presbyterian Homes and Services	North Oaks	MN	669	77	429	163	11.5%	64.1%	24.4%
58	101	Friendship Village Sunset Hills	Friendship Village of St. Louis	St. Louis	MO	668	448	76	144	67.1%	11.4%	21.6%
59	58	St. Ann's Community	St. Ann's of Greater Rochester	Rochester	NY	662	120	120	422	18.1%	18.1%	63.7%
60	59	Concordia Village of Tampa	Concordia Lutheran Ministries	Tampa	FL	661	333	165	163	50.4%	25.0%	24.7%
61	61	John Knox Village of Central Florida		Orange City	FL	654	455	199	0	69.6%	30.4%	0.0%
62	62	LindenGrove Communities		Brookfield	WI	650	0	189	461	0.0%	29.1%	70.9%
63	63	Plantation Estates	Acts Retirement-Life Communities	Matthews	NC	642	502	60	80	78.2%	9.3%	12.5%
64	69	Mary's Woods at Marylhust Inc.		Lake Oswego	OR	638	481	134	23	75.4%	21.0%	3.6%
65	70	Westminster-Canterbury on Chesapeake Bay		Virginia Beach	VA	638	450	80	108	70.5%	12.5%	16.9%
66	64	Raybrook Manor	Holland Home	Grand Rapids	MI	638	299	238	101	46.9%	37.3%	15.8%
67	65	Miami Jewish Health		Miami	FL	637	99	100	438	15.5%	15.7%	68.8%
68	66	Army Residence Community		San Antonio	TX	634	465	78	91	73.3%	12.3%	14.4%
69	67	Tel Hai Retirement Community		Honey Brook	PA	633	404	100	129	63.8%	15.8%	20.4%
70	68	Loretto Brighton Campus	Loretto	Syracuse	NY	633	0	79	554	0.0%	12.5%	87.5%
71	71	The Village in Gainesville	SantaFe Senior Living	Gainesville	FL	630	497	133	0	78.9%	21.1%	0.0%
72	110	Rolling Green Village		Greenville	SC	624	502	50	72	80.4%	8.0%	11.5%
73	73	VMP		West Allis	WI	624	294	180	150	47.1%	28.8%	24.0%
74	74	Ingleside at King Farm	Ingleside	Rockville	MD	619	366	75	178	59.1%	12.1%	28.8%
75	75	Westminster Oaks	Westminster Communities of Florida	Tallahassee	FL	617	412	85	120	66.8%	13.8%	19.4%

Additional Listings: Largest Individual Campuses (Continued)

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

2021 Rank	2020 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
76	76	Fellowship Square-Tucson Campus	Christian Care Companies	Tucson	AZ	615	555	60	0	90.2%	9.8%	0.0%
77	77	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	41.6%	14.8%	43.6%
78	79	Carolina Meadows, Inc.		Chapel Hill	NC	611	447	78	86	73.2%	12.8%	14.1%
79	78	Messiah Village	Messiah Lifeways	Mechanicsburg	PA	610	275	157	178	45.1%	25.7%	29.2%
80	81	La Posada at Park Centre, Inc.		Sahuarita	AZ	608	471	137	0	77.5%	22.5%	0.0%
81	90	Twin Lakes Community		Burlington	NC	606	434	56	116	71.6%	9.2%	19.1%
82	82	Ohio Living Breckenridge Village	Ohio Living	Willoughby	OH	603	453	42	108	75.1%	7.0%	17.9%
83	83	St. Andrew's Estates	Acts Retirement-Life Communities	Boca Raton	FL	600	441	70	89	73.5%	11.7%	14.8%
84	NR	Tall Grass Creek	National Senior Campuses	Overland Park	KS	598	498	56	44	83.3%	9.4%	7.4%
85	85	Croasdaile Village	The United Methodist Retirement Homes	Durham	NC	593	449	30	114	75.7%	5.1%	19.2%
86	87	Springmoor Life Care Retirement Community		Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
87	88	Moorings Park	The Moorings, Inc.	Naples	FL	583	401	76	106	68.8%	13.0%	18.2%
88	86	Kirby Pines		Memphis	TN	580	396	94	90	68.3%	16.2%	15.5%
89	89	Oakwood Village University Woods	Oakwood Lutheran Senior Ministries	Madison	WI	577	382	100	95	66.2%	17.3%	16.5%
90	NR	Friendship Village Chesterfield	Friendship Village of St. Louis	St. Louis	MO	575	362	92	121	63.0%	16.0%	21.0%
91	91	Presbyterian Village North		Dallas	TX	570	253	145	172	44.4%	25.4%	30.2%
92	92	Asbury Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	70.3%	17.6%	12.1%
93	93	The Philadelphia Protestant Home		Philadelphia	PA	567	266	175	126	46.9%	30.9%	22.2%
94	94	Otterbein Franklin Retirement Community	Otterbein SeniorLife	Franklin	OH	563	264	91	208	46.9%	16.2%	36.9%
95	96	Fellowship Square-Phoenix Campus	Christian Care Companies	Phoenix	AZ	559	404	87	68	72.3%	15.6%	12.2%
96	95	Bristol Village	National Church Residences	Waverly	OH	558	455	46	57	81.5%	8.2%	10.2%
97	97	East Ridge Retirement Village	SantaFe Senior Living	Cutler Bay	FL	557	247	176	134	44.3%	31.6%	24.1%
98	98	Richfield Retirement Community		Salem	VA	555	76	164	315	13.7%	29.5%	56.8%
99	99	Asbury Place Maryville	Asbury Communities	Maryville	TN	554	261	92	201	47.1%	16.6%	36.3%
100	100	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

2021 Rank	2020 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
101	102	St. Camillus		Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
102	116	Masonic Care Community		Utica	NY	551	151	80	320	27.4%	14.5%	58.1%
103	105	Mayflower Gardens	Retirement Housing Foundation	Lancaster	CA	549	501	0	48	91.3%	0.0%	8.7%
104	103	Carroll Lutheran Village	Lutheran Social Ministries of Maryland	Westminster	MD	549	396	50	103	72.1%	9.1%	18.8%
105	84	Brookview	Menno Haven	Chambersburg	PA	547	358	89	100	65.4%	16.3%	18.3%
106	106	The Mennonite Village		Albany	OR	547	321	131	95	58.7%	23.9%	17.4%
107	107	Fountainview at Eisenburg Village	Los Angeles Jewish Home	Reseda	CA	545	108	271	166	19.8%	49.7%	30.5%
108	108	Medford Leas		Medford	NJ	543	401	75	67	73.8%	13.8%	12.3%
109	109	The RiverWoods at Exeter	The RiverWoods Group	Exeter	NH	542	393	71	78	72.5%	13.1%	14.4%
110	114	Aldersgate United Methodist Retirement		Charlotte	NC	541	302	114	125	55.8%	21.1%	23.1%
111	111	Phoebe Allentown	Phoebe Ministries	Allentown	PA	541	88	58	395	16.3%	10.7%	73.0%
112	112	Casa de las Campanas		San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
113	113	Good Samaritan Village of Hastings	The Evangelical Lutheran Good Samaritan Society	Hastings	NE	540	324	51	165	60.0%	9.4%	30.6%
114	115	Royal Oaks Life Care Community		Sun City	AZ	535	360	175	0	67.3%	32.7%	0.0%
115	117	Mission Ridge / St. John's Lutheran Home		Billings	MT	534	122	226	186	22.8%	42.3%	34.8%
116	NR	Hoosier Village		Indianapolis	IN	533	240	216	77	45.0%	40.5%	14.4%
117	119	Breton Woods	Holland Home	Kentwood	MI	529	441	30	58	83.4%	5.7%	11.0%
118	120	Cypress Cove at HealthPark Florida		Fort Myers	FL	529	377	88	64	71.3%	16.6%	12.1%
119	121	Luther Acres Senior-Living Community	LutherCare	Lititz	PA	528	352	70	106	66.7%	13.3%	20.1%
120	122	Magnolia Manor of Americus		Americus	GA	528	105	187	236	19.9%	35.4%	44.7%
121	124	Blue Skies of Texas East	Blue Skies of Texas	San Antonio	TX	525	371	78	76	70.7%	14.9%	14.5%
122	125	Pine Run Community		Doylestown	PA	525	288	147	90	54.9%	28.0%	17.1%
123	118	Westminster Place		Evanston	IL	525	249	88	188	47.4%	16.8%	35.8%
124	126	Fleet Landing		Atlantic Beach	FL	524	354	100	70	67.6%	19.1%	13.4%
125	127	Cristwood Retirement Community		Seattle	WA	524	276	81	167	52.7%	15.5%	31.9%

Additional Listings: Largest Individual Campuses (Continued)

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

2021 Rank	2020 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/20)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
126	80	Copeland Oaks		Sebring	OH	522	122	224	176	23.4%	42.9%	33.7%
127	NR	Abbey Delray	Lifespace Communities	Delray Beach	FL	520	342	78	100	65.8%	15.0%	19.2%
128	128	Boutwells Landing	Presbyterian Homes and Services	Oak Park	MN	520	316	96	108	60.8%	18.5%	20.8%
129	129	Lutheran Home	Lutheran Life Communities	Arlington	IL	520	0	136	384	0.0%	26.2%	73.8%
130	130	CC Young		Dallas	TX	519	223	167	129	43.0%	32.2%	24.9%
131	131	Givens Estates	Givens Communities	Asheville	NC	518	387	61	70	74.7%	11.8%	13.5%
132	132	Wesley Willows	Wesley Willows	Rockford	IL	517	260	166	91	50.3%	32.1%	17.6%
133	133	Cardinal Carberry Campus	Cardinal Ritter Senior Services	Saint Louis	MO	517	207	80	230	40.0%	15.5%	44.5%
134	123	Covenant Living at Windsor Park		Carol Stream	IL	516	356	91	69	69.0%	17.6%	13.4%
135	134	The Lutheran Home		Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
136	135	Wesleyan Homes		Georgetown	TX	513	247	266	0	48.1%	51.9%	0.0%
137	136	Wesley Homes Des Moines	Wesley	Des Moines	WA	512	325	39	148	63.5%	7.6%	28.9%
138	137	Homewood at Plum Creek	Homewood Retirement Centers	Hanover	PA	512	296	96	120	57.8%	18.8%	23.4%
139	139	The Advent Christian Village		Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
140	140	The Buckingham		Houston	TX	510	308	110	92	60.4%	21.6%	18.0%
141	138	The Lakewood		Richmond	VA	509	339	74	96	66.6%	14.5%	18.9%
142	142	Menno Village	Menno Haven	Chambersburg	PA	509	224	89	196	44.0%	17.5%	38.5%
143	143	Ingleside at Rock Creek	Ingleside	Washington	DC	508	232	91	185	45.7%	17.9%	36.4%
144	144	Carolina Village, Inc.		Hendersonville	NC	507	389	60	58	76.7%	11.8%	11.4%
145	145	Covenant Living at The Holmstad	Covenant Living Communities & Services	Batavia	IL	506	354	62	90	70.0%	12.3%	17.8%
146	147	Walker Campus	Walker Methodist	Minneapolis	MN	504	128	0	376	25.4%	0.0%	74.6%
147	148	Deerfield Episcopal Retirement Community, Inc.		Asheville	NC	502	378	62	62	75.3%	12.4%	12.4%
148	141	Londonderry Village		Palmyra	PA	500	374	38	88	74.8%	7.6%	17.6%
149	NR	Rydal Park	HumanGood	Rydal	PA	500	332	54	114	66.4%	10.8%	22.8%
150	149	Havenwood Heritage Heights	United Church of Christ Retirement Community, Inc.	Concord	NH	497	347	55	95	69.8%	11.1%	19.1%
										60.0%	16.9%	23.1%

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

2021 Combined MR & AFF Rank	2021 LZ200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	AFF
1	1	National Senior Campuses, Inc.	MA	21,313	18,525	1,635	1,153	0
2	39	National Church Residences	OH	19,109	1,022	521	225	17,341
3	12	Retirement Housing Foundation	CA	16,123	2,642	886	611	11,984
4	2	The Evangelical Lutheran Good Samaritan Society	SD	15,507	4,795	2,110	8,602	0
5	6	HumanGood	CA	10,828	3,371	1,095	1,037	5,325
6	3	ACTS Retirement Services, Inc.	PA	9,563	6,728	1,133	1,702	0
7	4	Presbyterian Homes and Services	MN	8,868	4,555	2,524	1,500	289
8	NR	Mercy Housing	CO	8,206	0	0	0	8,206
9	5	Ascension Living	MO	8,129	2,124	1,203	4,802	0
10	7	Trinity Health Senior Communities	MI	6,005	1,839	1,199	2,458	509
11	11	Westminster Communities of Florida	FL	5,984	2,841	528	781	1,834
12	9	Covenant Living Communities & Services	IL	5,307	3,357	870	976	104
13	8	Lifespace Communities, Inc.	IA	5,234	3,652	599	983	0
14	NR	Christian Church Homes of Northern California	CA	5,052	0	0	0	5,052
15	16	Presbyterian Senior Living	PA	4,822	1,818	547	1,121	1,336
16	10	Benedictine	MN	4,616	879	1,577	2,160	0
17	NR	Elderly Housing Development and Operations Corporation	FL	4,412	0	0	0	4,412
18	18	Pacific Retirement Services	OR	4,364	2,561	398	405	1,000
19	25	Springpoint Senior Living Inc.	NJ	4,319	1,735	308	491	1,785
20	14	Lutheran Senior Services	MO	4,186	1,826	763	1,102	495
21	41	United Church Homes, Inc.	OH	3,936	701	269	745	2,221
22	15	Asbury Communities, Inc.	MD	3,842	2,148	522	909	263
23	17	Cassia	MN	3,754	522	1,512	1,636	84
24	13	The Kendal Corporation	PA	3,693	2,450	736	507	0
25	NR	Sustainable Housing for Ageless Generations (SHAG)	WA	3,500	0	0	0	3,500

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

2021 Combined MR & AFF Rank	2021 LZ200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	AFF
26	19	Ohio Living	OH	3,117	1,632	453	867	165
27	NR	Satellite Affordable Housing Associates	CA	3,000	0	0	0	3,000
28	21	The Carmelite System, Inc.	NY	2,961	51	498	2,349	63
29	20	Otterbein SeniorLife	OH	2,921	1,215	635	1,071	0
30	22	Front Porch Communities and Services	CA	2,860	2,159	183	518	0
31	62	Presbyterian Villages of Michigan	MI	2,840	904	264	102	1,570
32	23	Concordia Lutheran Ministries	PA	2,796	996	1,137	663	0
33	27	Transforming Age	WA	2,777	1,677	672	78	350
34	48	Presbyterian SeniorCare Network	PA	2,632	396	520	675	1,041
35	24	Masonic Villages	PA	2,557	1,614	259	684	0
36	26	Volunteers of America	VA	2,484	604	873	1,007	0
37	NR	Christopher Homes	LA	2,451	0	0	0	2,451
38	33	Diakon Lutheran Social Ministries	PA	2,407	763	414	895	335
39	NR	TELACU Residential Management	CA	2,399	0	0	0	2,399
40	31	Christian Care Companies	AZ	2,396	1,687	413	68	228
41	49	Hebrew SeniorLife	MA	2,349	655	115	814	765
42	NR	Catholic Housing Management	FL	2,246	0	0	0	2,246
43	28	Shell Point Retirement Community	FL	2,245	1,447	449	349	0
44	60	Covia Communities	CA	2,221	953	102	255	911
45	36	Greencroft Communities	IN	2,216	654	586	624	352
46	29	Christian Horizons	MO	2,181	383	312	1,486	0
47	30	Presbyterian Manors of Mid-America, Inc.	KS	2,180	893	537	750	0
48	NR	CARING Housing Ministries	CA	2,127	0	0	0	2,127
49	32	Ecumen	MN	2,109	376	1,391	342	0
50	34	Willow Valley Communities	PA	2,068	1,570	198	300	0

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

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

2021 Combined MR & AFF Rank	2021 LZ200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	AFF
51	46	Covenant Health	MA	2,064	0	364	1,272	428
52	NR	Wesley Living	TN	2,000	0	0	0	2,000
53	35	Homewood Retirement Centers, Inc.	MD	1,888	1,149	288	451	0
54	NR	Embrace Living Communities	IL	1,848	0	0	0	1,848
55	42	Franciscan Communities	IL	1,841	744	345	613	139
56	85	Christian Care Communities	KY	1,799	432	179	405	783
57	NR	Associate Catholic Charities (Archdiocese of Baltimore)	MD	1,790	0	0	0	1,790
58	37	WesleyLife	IA	1,788	764	366	658	0
59	38	ArchCare	NY	1,782	0	59	1,723	0
60	40	Bethesda Senior Living Communities	CO	1,738	111	1,627	0	0
61	43	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	0
62	44	Loretto	NY	1,684	210	551	923	0
63	NR	Salvation Army Silvercrest Management of California	CA	1,678	0	0	0	1,678
64	45	Eskaton	CA	1,659	393	780	486	0
65	59	Methodist Retirement Communities	TX	1,635	629	393	294	319
66	47	BHI Senior Living, Inc.	IN	1,622	497	773	352	0
67	54	Providence Life Services	IL	1,582	767	372	282	161
68	50	Bethesda Health Group, Inc.	MO	1,523	727	78	718	0
69	51	Baptist Village Communities	OK	1,521	939	257	325	0
70	74	Phoebe Ministries	PA	1,519	370	259	534	356
71	NR	Catholic Charities of the Archdiocese of Chicago	IL	1,499	0	0	0	1,499
72	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	0
73	69	UMRC and Porter Hills	MI	1,469	678	335	186	270
74	53	Mississippi Methodist Senior Services, Inc.	MS	1,423	753	350	320	0
75	55	Presbyterian Homes	IL	1,411	833	237	341	0

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

2021 Combined MR & AFF Rank	2021 LZ200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	AFF
76	56	Lutheran Life Communities	IL	1,402	408	310	684	0
77	57	Lutheran Services Carolinas	NC	1,401	341	295	732	33
78	NR	Oklahoma City Housing Authority	MD	1,396	0	0	0	1,396
79	111	The New Jewish Home	NY	1,388	24	0	814	550
80	104	St. Andrew's Resources for Seniors System	MO	1,370	379	208	290	493
81	NR	Victory Housing, Inc.	IL	1,347	0	0	0	1,347
82	58	Masonicare	CT	1,326	651	309	366	0
83	84	The Presbyterian Homes, Inc.	NC	1,325	706	133	189	297
84	113	Presbyterian Homes of Georgia	GA	1,322	330	149	335	508
85	68	American Baptist Homes of the Midwest	MN	1,311	359	272	589	91
86	61	SantaFe Senior Living Inc.	FL	1,306	876	316	114	0
87	80	Lutheran SeniorLife	PA	1,300	492	192	399	217
88	153	Genacross Lutheran Services	OH	1,294	137	175	285	697
89	63	LifeSpire of Virginia	VA	1,268	756	285	227	0
90	64	Heritage Ministries	NY	1,268	363	221	684	0
91	100	Givens Communities	NC	1,262	681	89	130	362
92	NR	Lutheran Social Services of Illinois	IL	1,255	0	0	0	1,255
93	65	National Lutheran Communities and Services	MD	1,251	697	245	309	0
94	NR	New Samaritan Corporation	CA	1,251	0	0	0	1,251
95	66	Immanuel	NE	1,240	646	393	201	0
96	67	Wesley Enhanced Living	PA	1,235	646	229	360	0
97	NR	Menorah Housing Foundation	MA	1,221	0	0	0	1,221
98	75	Eventide	MN	1,201	71	533	552	45
99	NR	2Life Communities	NY	1,200	0	0	0	1,200
100	70	Holland Home	MI	1,198	751	288	159	0

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

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

2021 Combined MR & AFF Rank	2021 LZ200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	AFF
101	71	Western Home Services Inc.	IA	1,193	596	314	283	0
102	117	Methodist Homes of Alabama & Northwest Florida	AL	1,190	39	339	425	387
103	NR	Avesta Housing Development Corporation	OR	1,188	0	0	0	1,188
104	103	United Methodist Communities	NJ	1,184	88	548	248	300
105	72	SpiriTrust Lutheran	PA	1,182	549	289	344	0
106	73	Friendship Villages of St. Louis	MO	1,175	811	130	234	0
107	93	United Church Homes and Services	NC	1,173	535	90	328	220
108	127	Samaritas	MI	1,154	293	120	348	393
109	NR	Selfhelp Realty Group	OK	1,150	0	0	0	1,150
110	76	United Methodist Homes	NY	1,134	437	271	426	0
111	77	Pinnacle Living	VA	1,127	544	393	190	0
112	78	Friendship Senior Options	IL	1,115	689	184	242	0
113	79	Ingleside	MD	1,112	832	157	123	0
114	81	Walker Methodist	MN	1,075	0	748	327	0
115	82	Life Enriching Communities	OH	1,067	613	178	276	0
116	83	Lutheran Homes of South Carolina	SC	1,064	407	306	351	0
117	NR	LSC Service Corp	PA	1,034	0	0	0	1,034
118	86	Baruch Senior Ministries	MI	1,002	0	1,002	0	0
119	91	The United Methodist Retirement Homes, Inc.	NC	999	659	114	202	24
120	136	Christian Health fka Christian Health Care Center	NJ	998	329	80	298	291
121	87	Felician Services, Inc.	IL	990	177	268	545	0
122	88	Blue Skies of Texas	TX	984	728	129	127	0
123	89	Presbyterian Communities of South Carolina	SC	983	411	298	274	0
124	90	Liberty Lutheran Services	PA	978	443	318	217	0
125	97	Christian Living Communities	CO	970	427	311	192	40

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

2021 Combined MR & AFF Rank	2021 LZ200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	AFF
126	92	Saint Therese	MN	965	467	133	365	0
127	102	Masonic Homes Kentucky	KY	964	450	151	287	76
128	94	Sequoia Living	CA	946	702	103	141	0
129	95	The RiverWoods Group	NH	940	681	172	87	0
130	110	Living Branches	PA	939	459	237	143	100
131	96	Wesley	WA	930	592	154	184	0
132	176	Lutheran Social Ministries of New Jersey, Inc.	NJ	921	270	114	109	428
133	98	St. John's	NY	916	403	38	475	0
134	99	St. Ann's of Greater Rochester, Inc.	NY	913	296	75	542	0
135	NR	Union Labor Retirement Association	ME	900	0	0	0	900
136	146	Maple Knoll Communities, Inc.	OH	892	400	91	158	243
137	101	Haverland Carter Lifestyle Group	NM	890	410	373	107	0
138	NR	Lutheran Social Services of Ohio	OH	888	0	0	0	888
139	105	Menno Haven, Inc.	PA	868	506	202	160	0
140	106	Sun Health Services	AZ	867	637	115	115	0
141	109	Garden Spot Communities	PA	850	621	105	119	5
142	107	Goodwin House Incorporated	VA	850	580	121	149	0
143	108	Mather	IL	848	712	59	77	0
144	115	Landis Communities	PA	844	545	160	103	36
145	197	Jewish Senior Life of Metropolitan Detroit	MI	829	290	94	0	445
146	112	Lutheran Social Ministries of Maryland	MD	822	637	70	115	0
147	114	LutherCare	PA	810	473	126	211	0
148	116	Messiah Lifeways	PA	808	441	183	184	0
149	118	Wesley Willows	IL	802	546	165	91	0
150	119	Simpson Senior Services	PA	802	454	170	178	0

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

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

2021 Combined MR & AFF Rank	2021 LZ200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	AFF
151	134	Episcopal SeniorLife Communities	NY	802	334	200	182	86
152	164	Sholom Community Alliance	MN	795	153	142	257	243
153	120	Oakwood Lutheran Senior Ministries	WI	789	492	197	100	0
154	121	Sunnyside Communities	VA	783	494	155	134	0
155	122	Vista Prairie Communities	MN	783	100	683	0	0
156	123	The Moorings, Incorporated	FL	777	557	114	106	0
157	124	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	0
158	125	Grace Inspired Ministries	PA	767	451	151	165	0
159	126	United Church of Christ Homes	PA	766	267	124	375	0
160	128	Christian Care Centers, Inc.	TX	759	411	229	119	0
161	145	Baptist Homes Society	PA	753	326	138	189	100
162	143	St. John's United	MT	749	195	284	186	84
163	129	Brazos Presbyterian Homes	TX	747	425	121	201	0
164	130	Benevolent Corporation Cedar Community	WI	747	412	225	110	0
165	131	The Ohio Masonic Home	OH	732	302	266	164	0
166	132	Bethany Lutheran Homes, Inc.	WI	726	282	321	123	0
167	133	Emerald Communities	WA	725	527	107	91	0
168	135	Morningside Ministries	TX	707	345	152	210	0
169	NR	DePaul Housing Management Corporation	OH	704	0	0	0	704
170	160	Episcopal Communities & Services	CA	700	436	82	48	134
171	137	United Methodist Memorial Home	IN	699	188	255	256	0
172	138	LifeStream Complete Senior Living, Inc.	AZ	694	369	158	167	0
173	139	Sunset Senior Communities	MI	681	304	263	114	0
174	140	The Wesley Communities	OH	678	338	234	106	0
175	141	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	0

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

2021 Combined MR & AFF Rank	2021 LZ200 Rank	System Name	State	Units (as of 12/31/20)				
				Total	ILU	ALU	NCB	AFF
176	142	Vincentian Collaborative Services	PA	675	66	82	527	0
177	144	Elder Care Alliance	CA	658	135	464	59	0
178	159	Ebenezer Society	MN	641	0	320	247	74
179	147	Community Wellness Partners, Inc.	NY	640	124	0	516	0
180	NR	Aging True	NY	637	0	0	0	637
181	148	Smith Senior Living	IL	636	322	144	170	0
182	149	Wellspring Lutheran Services	MI	635	125	169	341	0
183	150	CRISTA Senior Living	WA	624	374	141	109	0
184	151	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	0
185	152	Baptist Retirement Homes of North Carolina, Inc.	NC	597	262	134	201	0
186	154	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	0
187	155	Lutheran Life Villages	IN	577	183	69	325	0
188	156	Episcopal Retirement Services	OH	576	267	115	194	0
189	157	Friends Homes, Inc.	NC	568	359	100	109	0
190	158	Havenwood Heritage Heights	NH	567	367	63	137	0
191	173	Rockwood Retirement Communities	WA	567	346	94	65	62
192	161	Bethel	NY	563	170	130	263	0
193	162	Christian Village Communities	OH	559	221	190	148	0
194	163	Friendly Senior Living	NY	555	298	57	200	0
195	NR	Community Housing Management Services	FL	548	0	0	0	548
196	165	Church Homes, Inc.	CT	542	319	24	199	0
197	166	Cardinal Ritter Senior Services	MO	541	205	90	246	0
198	167	Medford Leas	NJ	536	393	119	24	0
199	NR	Lesley Senior Communities	CA	534	0	0	0	534
200	168	EHM Senior Solutions	MI	529	112	70	347	0

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

LZ

A large, stylized gold number '200' graphic. The '2' is a thick, flowing line that curves into a loop. The '0' is a simple, thick oval. The '0' is partially overlaid by a photograph of a swimming pool and a wall with greenery.

LZ 200 LZ 200 LZ 200 LZ 200 LZ 200 LZ 200 LZ 200 LZ 200

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.

Index

CHAPTER 3
The Rankings

3-1a-e	The Nation's Largest Not-for-profit Multi-site Senior Living Organizations	18
a.	Ranked by Total Senior Living Units (Primary Ranking)	22
b.	Ranked by Independent Living Units	30
c.	Ranked by Assisted Living Units	38
d.	Ranked by Nursing Care Beds	46
e.	The Over 200	54
3-2a	Change at a Glance	
b.	Greatest Changes in Units	55
c.	Greatest Changes in Rank	56

CHAPTER 4
Analysis of the Data

4-1a-e	Units	
a.	2020 Rank, Detailed by Units (2019 vs. 2020)	60
b.	Summary of Unit Mix (by Largest 10, 25, 50, 100 & Total)	68
c.	Percentage of Total Units Owned (by Largest 10, 25, 50, 100 & 150)	69
d.	Total Mix by Year, by Percent, 2000 Through 2020 for 2021 LZ 200	70
e.	Unit Type Comparison, 2000 Through 2020 for 2021 LZ 200	71
4-2a-e	Communities	
a.	Rank Detailed by Communities (2020 vs 2019)	72
b.	Summary of Community Mix (By Largest 10, 25, 50, 100 & Total)	80
c.	Percentage of Total Communities Owned (By Largest 10, 25, 50, 100 & 150)	81
d.	Total Mix by Year, by Percent, 2000 Through 2020 for 2021 LZ 200	82
e.	Community Type Comparison, by Community, 2000 Through 2020 for 2021 LZ 200	83
4-3a-f	Locations	84
a.	Community Locations	85
b.	Life Plan Community (LPC) Locations	86
c.	Independent Living (IL) Community Locations	87
d.	Assisted Living (AL) Community Locations	88
e.	Nursing Home (NH) Locations	89

4-4a-c	System Headquarters	90
a.	Headquarters' Locations	91
b.	Headquarters' Locations by Size	92
4-5	Metropolitan Statistical Areas	93
4-6a-b	Geographic Classifications	94
a.	Primary Classifications	96
b.	Primary Classifications by Largest 10, 25, 50, 100, 150, & Total	97
c.	Secondary Classifications	98
4-7	Corporate Name Changes	99
4-8a-b	Debt Ratings	
a.	Rated Debt as of 12/31/2020	100
b.	Ratings by Category	103
4-9a-b	Revenues	
a.	Average Revenue by Organization (Overview)	104
b.	Average Revenue by Organization (Listing)	105
4-10a-d	Corporate Structure	
a.	Most Common Corporate Positions Created in 2020	111
b.	Corporate Staffing Changes	112
c.	Corporate Tenure	114
4-11a-b	Accreditation	115
a.	Accredited Communities	116
b.	At Least One Accredited Community	117
4-12a-b	Staffing	
a.	Average Number of Employees, 2005-2020	118
b.	Summary of Employees, 2010-2020	119
4-13	Rental LPCs	120
4-14a-d	Affiliations	
a.	Affiliation by Total Number of Systems	121
b.	Affiliation by Total Number of Units	122
c.	Faith-based Affiliations, by Total Number of Systems	123
d.	Faith-based Affiliations, by Total Units	124
4-15a-c	Affordable Housing	
a.	Comparison of Market-Rate Units Vs. Affordable Units of Housing Providers	125
b.	Percentage Providing Affordable Housing	126

4-16a-c	Managed Units & Communities	
a.	Providers that Manage, Ranked by Managed-Only Units	127
b.	Comparison of Owned vs. Managed Communities and Units of Providers that Manage	129
c.	Percentage that Manage	130
d.	Providers that Manage, Ranked by Market Rate & Managed Units	131
4-17a-c	Assisted and Skilled Composition	
a.	Percentage That Offer Private Versus Semi-Private Units	139
b.	Percentage That Offer Memory Support	140
c.	Type of Memory Support Offered	141
4-18a-c	Home and Community-Based Services (HCBS)	
a.	Percentage Offering HCBS to Non-Residents	142
b.	Offering: PACE, CCaH, External Hospice & Other Home Care	143
c.	HCBS Providers with \$10 Million+ in HCBS Revenue	144
4-19a-f	Technology	
a.	Percentage of Communities/Operations Using Electronic Documentation Technologies	148
b.	Percentage Communities/Operations Using Safety Monitoring Technologies	149
c.	Percentage of Coordination Software & Resident Engagement Technologies	150
d.	Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies	151
e.	Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies	152
f.	Percentage of Communities/Operations Using Staff & Resident Screening and Infection Control Technologies	153
g.	Type of EMR/EHR Technology	154
h.	Health Information Exchange	155
4-20a-d	Organizational Characteristics	
a.	Percentage Engaged in a Joint Venture	156
b.	Type of Joint Venture	157
c.	Organizations in an ACO, Bundled Payment Contract	158
d.	Medicare Advantage Plan	159



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